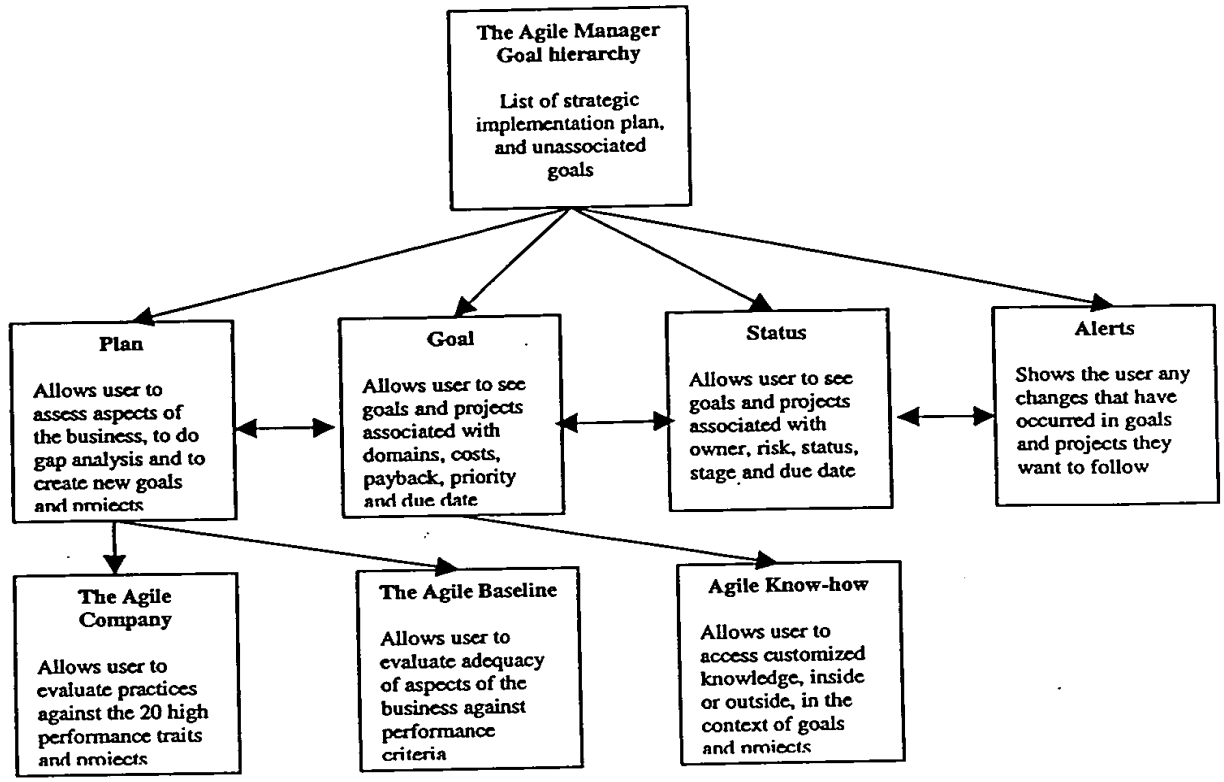

The Agile Manager
Goal hierarchy
List of strategic implementation plan, and unassociated goals
Plan
Allows user to assess aspects of the business, to do gap analysis and to create new goals and projects
Goal
Allows user to see goals and projects associated with domains, costs, payback, priority and due date
Status
Allows user to see goals and projects associated with owner, risk, status, stage and due date
Alerts
Shows the user any changes that have occurred in goals and projects they want to follow
The Agile Company
Allows user to evaluate practices against the 20 high performance traits and projects
The Agile Baseline
Allows user to evaluate adequacy of aspects of the business against performance criteria
Agile Know-how
Allows user to access customized knowledge, inside or outside, in the context of goals and projects

FIG. 1

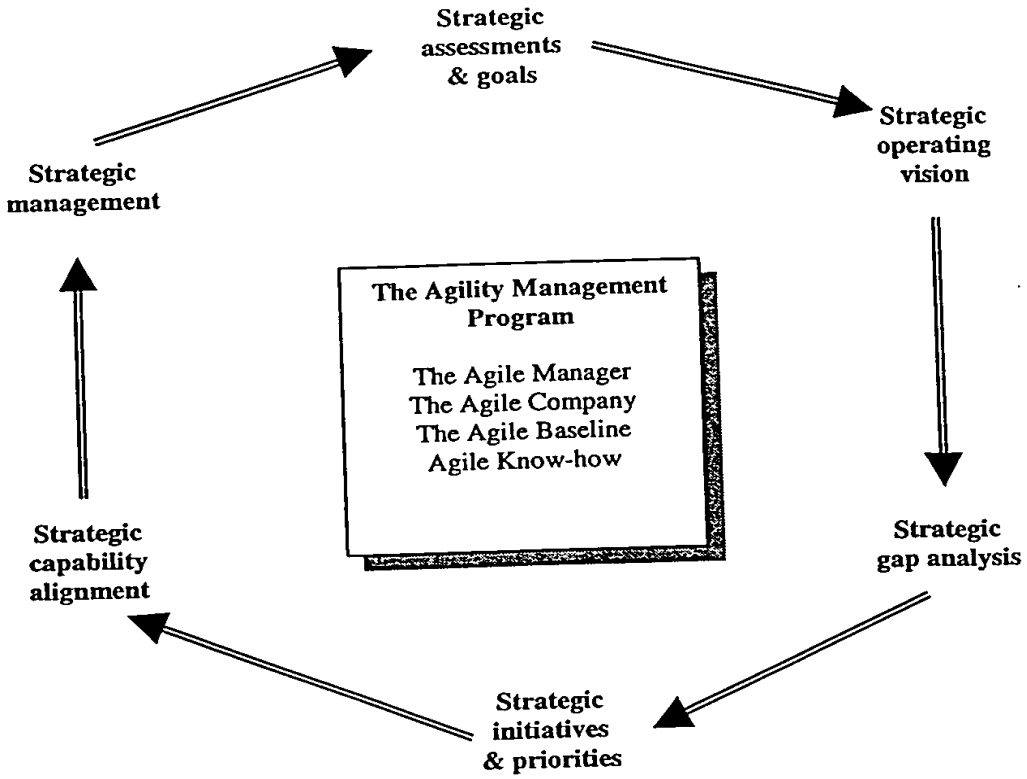

Strategic assessments & goals
Strategic operating vision
Strategic gap analysis
Strategic initiatives & priorities
Strategic capability alignment
Strategic management
The Agility Management Program
The Agile Manager
The Agile Company
The Agile Baseline
Agile Know-how

FIG. 2

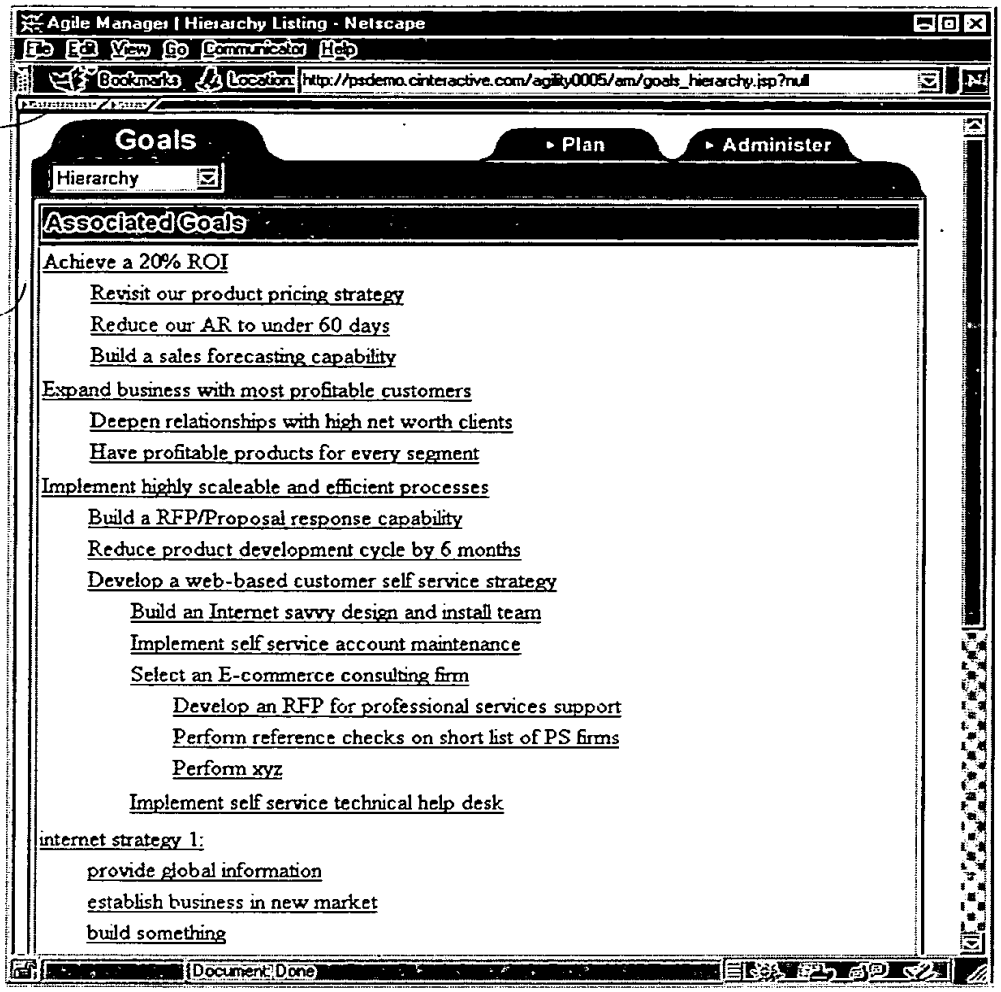
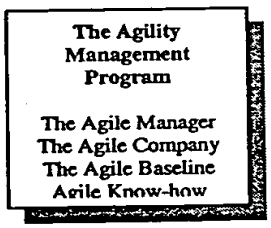

Agile Manager | Hierarchy Listing - Netscape
File Edit View Go Communicator Help
Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_hierarchy.jsp?null
Goals
Plan
Administer
Hierarchy
Associated Goals
Achieve a 20% ROI
Revisit our product pricing strategy
Reduce our AR to under 60 days
Build a sales forecasting capability
Expand business with most profitable customers
Deepen relationships with high net worth clients
Have profitable products for every segment
Implement highly scaleable and efficient processes
Build a RFP/Proposal response capability
Reduce product development cycle by 6 months
Develop a web-based customer self service strategy
Build an Internet savvy design and install team
Implement self service account maintenance
Select an E-commerce consulting firm
Develop an RFP for professional services support
Perform reference checks on short list of PS firms
Perform xyz
Implement self service technical help desk
internet strategy 1:
provide global information
establish business in new market
build something
Document Done

FIG. 3



Senior executives

- Set direction
- Prioritize investments
- Improve performance

Managers

- Focus on strategic issues
- Manage initiatives
- Lead successful change

Teams

- Create innovative solutions
- Coordinate work
- Achieve business benefits

Individuals

- Think like owners
- Link to corporate goals
- Grow and succeed

6674750 - 07/27/2009

FIG. 4

Research based *Diagnostics* reduce organizational barriers

Enterprise

- "Hard-wired" to customer needs/behaviors
- Infectious, improvement-driven leadership
- Visionary leadership with crystal clear communication
- Employees act like/treated like owners
- Action focused innovation/risk taking rewarded
- Value based decision making at lowest level
- Adaptive culture, revolutionary when necessary
- Driven to excel; "good enough never is"
- Relentless commitment to lower cost and higher quality
- Boundaryless, but well managed structures
- Time/resources focus on high value initiatives
- Systematic, opportunistic strategies that adapt
- Concentrate where the business leverage is
- Exacting execution with reliable results
- Information/knowledge accessible as needed

Management Team

- Focusing on the highest gain strategic initiatives:
  - creating a portfolio of high leverage initiatives
  - reprioritizing the portfolio as things change
  - reviewing new/old initiatives for ROI impact
- Reducing organizational barriers to success:
  - determining factors critical for success
  - identifying key risks to be managed proactively
  - making adjustments to eliminate key barriers
- Applying management talent on the right things:
  - reinforcing strategic goals using structured communication
  - getting substance from management meetings
  - focusing management attention on the high leverage items
- Equipping leaders to succeed:
  - learning to think like owners
  - getting the most from interdisciplinary teams
  - managing project risk to value

FIG. 5

Agility
MANAGEMENT PARTNERS

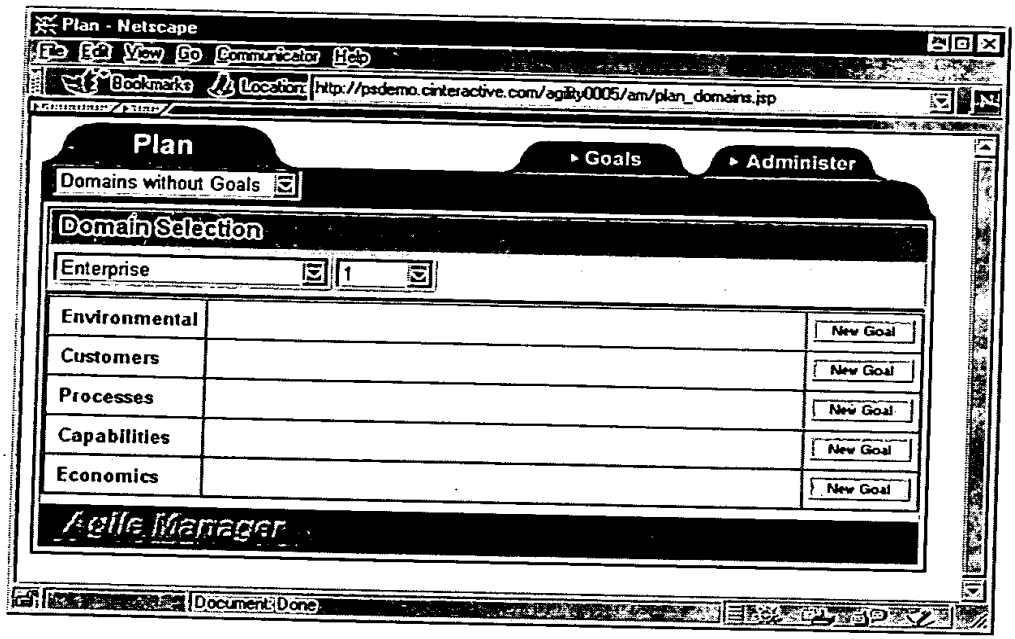

Plan - Netscape
File Edit View Go Communicator Help
Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/plan_domains.jsp
Plan
Goals
Administer
Domains without Goals
Domain Selection
Enterprise
1
Environmental
Customers
Processes
Capabilities
Economics
New Goal
New Goal
New Goal
New Goal
New Goal
Agile Manager
Document: Done

FIG. 6

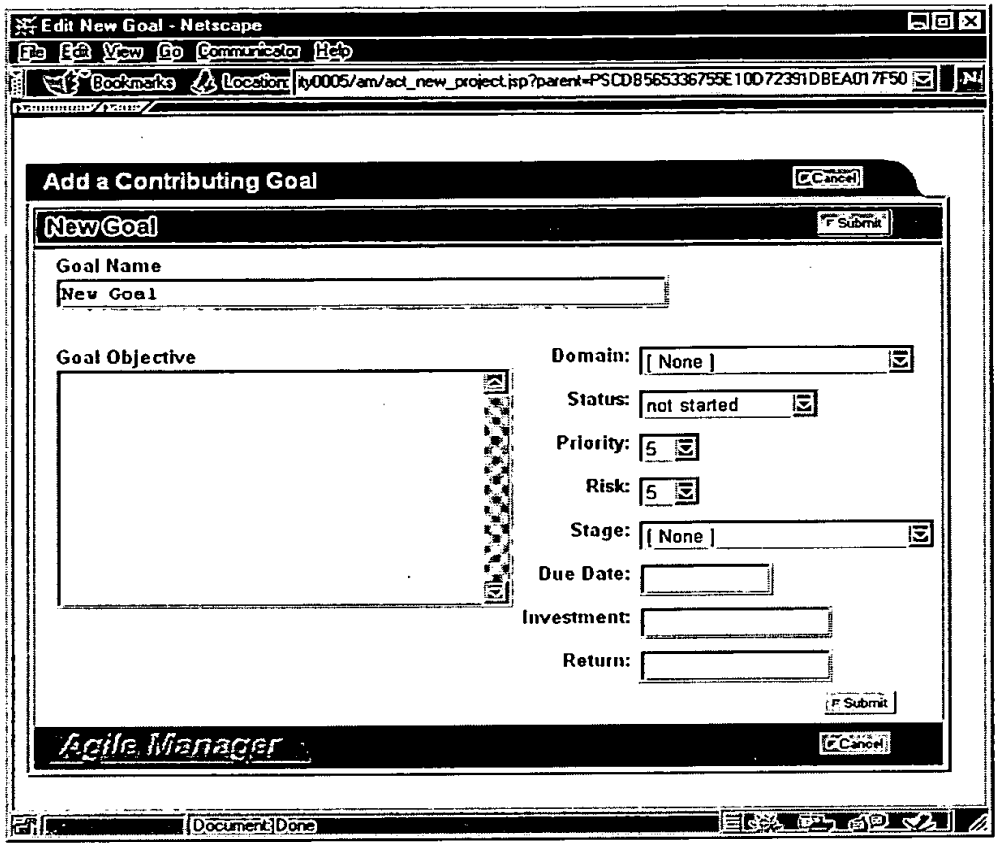

Edit New Goal - Netscape
File Edit View Go Communicator Help
Bookmarks Location: ity0005/am/act_new_project.jsp?parent=PSCD8565336755E10D72391DBEA017F50
Add a Contributing Goal
Cancel
New Goal
Submit
Goal Name
New Goal
Goal Objective
Domain: [None]
Status: not started
Priority: 5
Risk: 5
Stage: [None]
Due Date:
Investment:
Return:
Submit
Agile Manager
Cancel
Document: Done

FIG. 7

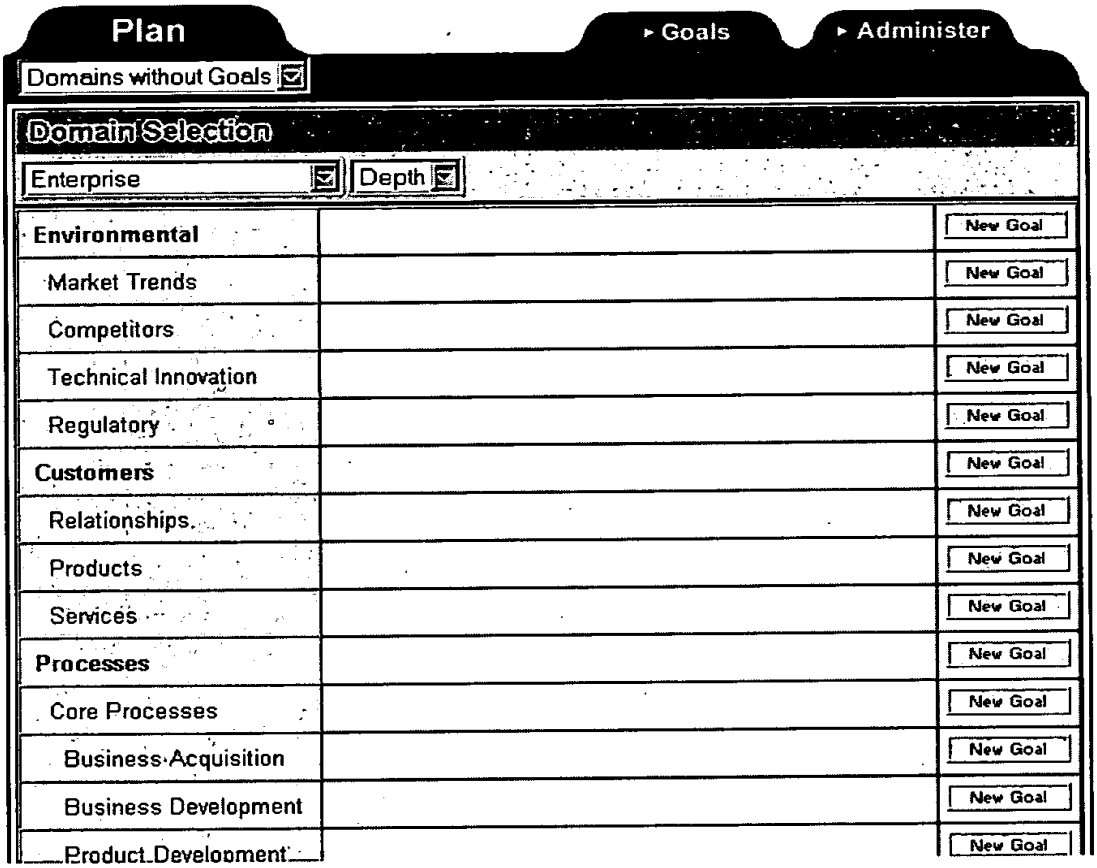

Plan
▸ Goals
▸ Administer
Domains without Goals
Domain Selection
Enterprise
Depth
Environmental
Market Trends
Competitors
Technical Innovation
Regulatory
Customers
Relationships
Products
Services
Processes
Core Processes
Business Acquisition
Business Development
Product Development
New Goal

FIG. 8

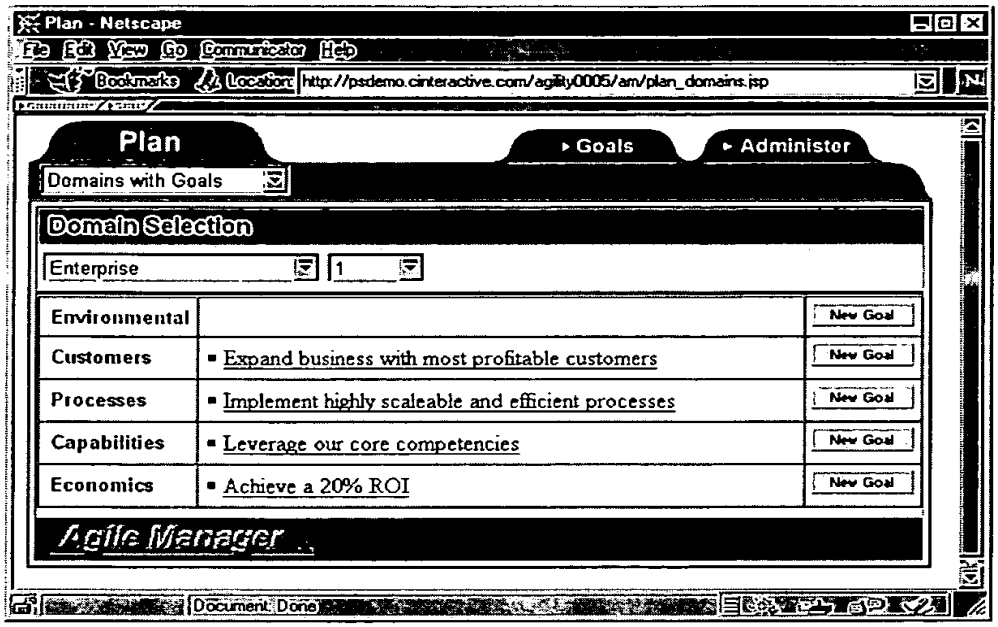

Plan - Netscape
File Edit View Go Communicator Help
Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/plan_domains.jsp
Plan
Goals
Administer
Domains with Goals
Domain Selection
Enterprise
1
Environmental
Customers
Expand business with most profitable customers
Processes
Implement highly scaleable and efficient processes
Capabilities
Leverage our core competencies
Economics
Achieve a 20% ROI
New Goal
Agile Manager
Document: Done

FIG. 9

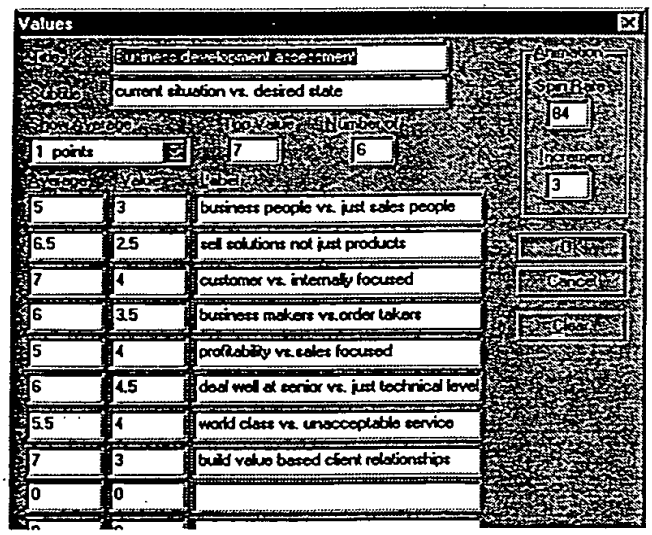

Values
Business development assessment
current situation vs. desired state
1 points
7
6
84
3
5
3
business people vs. just sales people
6.5
2.5
sell solutions not just products
7
4
customer vs. internally focused
6
3.5
business makers vs.order takers
5
4
profitability vs.sales focused
6
4.5
deal well at senior vs. just technical level
5.5
4
world class vs. unacceptable service
7
3
build value based client relationships
0
0

FIG. 10

Business development assessment

current situation vs. desired state

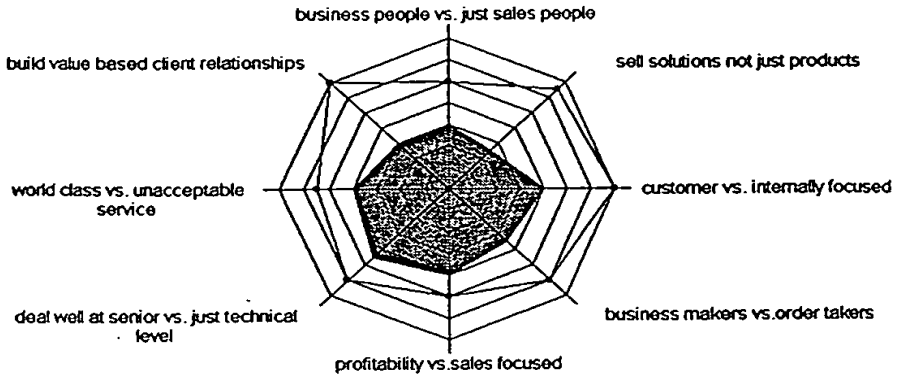


FIG. 11

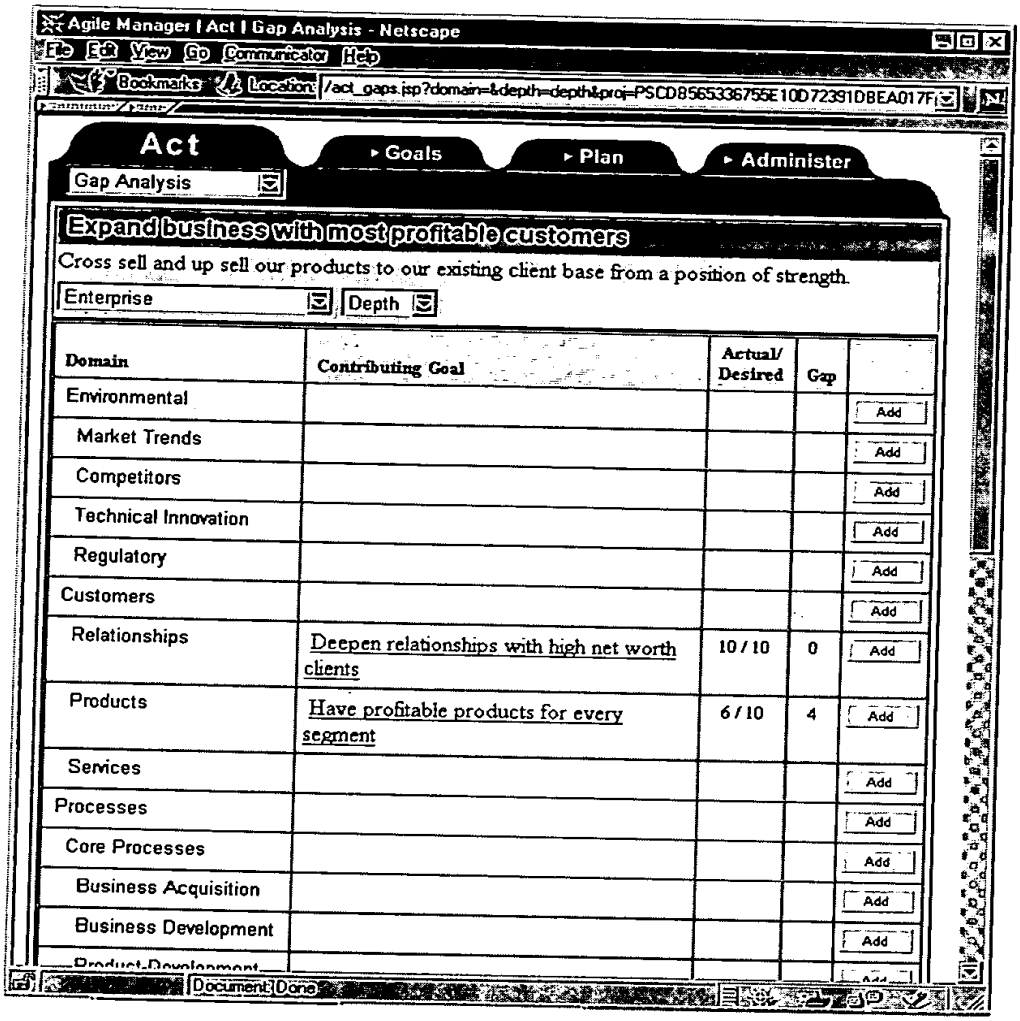

Agile Manager | Act | Gap Analysis - Netscape
File Edit View Go Communicator Help
Bookmarks Location /act_gaps.jsp?domain=&depth=depth&proj=PSCD8565336755E10D72391DBEA017F
Act
Goals
Plan
Administer
Gap Analysis
Expand business with most profitable customers
Cross sell and up sell our products to our existing client base from a position of strength.
Enterprise
Depth
Domain
Contributing Goal
Actual/ Desired
Gap
Environmental
Market Trends
Competitors
Technical Innovation
Regulatory
Customers
Relationships
Deepen relationships with high net worth clients
10 / 10
0
Products
Have profitable products for every segment
6 / 10
4
Services
Processes
Core Processes
Business Acquisition
Business Development
Add
Document: Done

FIG. 12

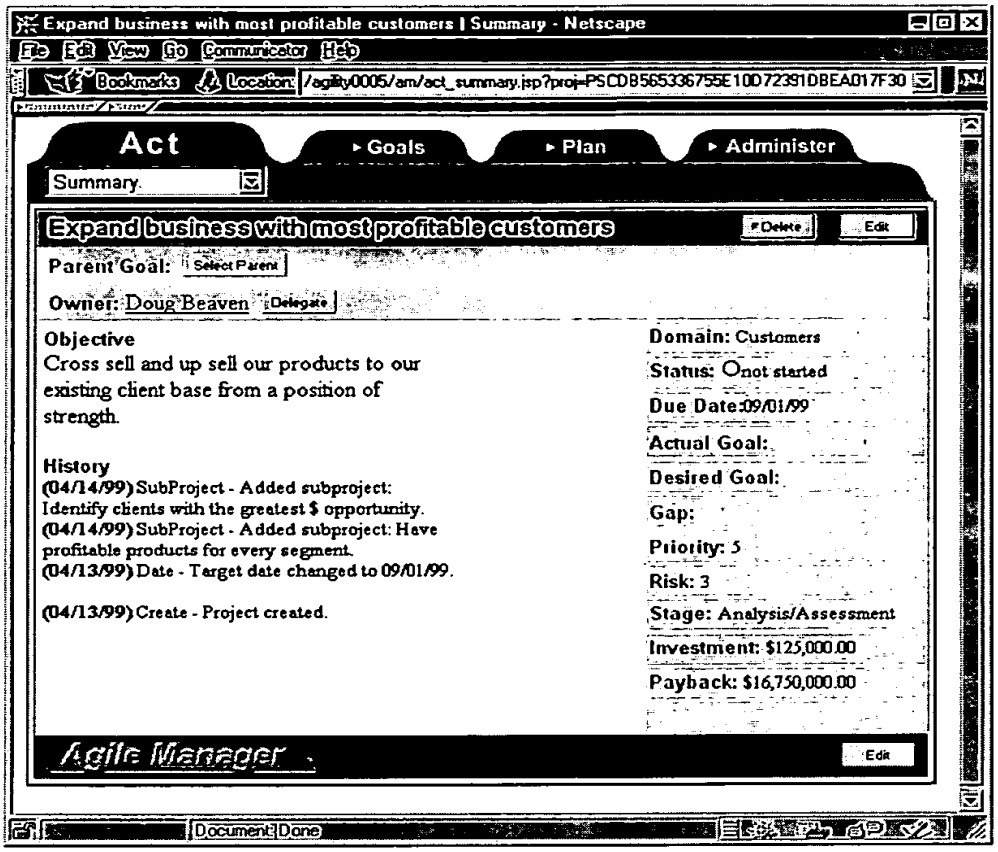

Expand business with most profitable customers | Summary - Netscape
File Edit View Go Communicator Help
Bookmarks Location: /agility0005/am/act_summary.jsp?proj=PSCDB565336755E10D72391DBEA017F30
Act
▸ Goals
▸ Plan
▸ Administer
Summary
Expand business with most profitable customers
Delete
Edit
Parent Goal: Select Parent
Owner: Doug Beaven Delegate
Objective
Cross sell and up sell our products to our existing client base from a position of strength.
History
(04/14/99) SubProject - Added subproject: Identify clients with the greatest $ opportunity.
(04/14/99) SubProject - Added subproject: Have profitable products for every segment.
(04/13/99) Date - Target date changed to 09/01/99.
(04/13/99) Create - Project created.
Domain: Customers
Status: not started
Due Date: 09/01/99
Actual Goal:
Desired Goal:
Gap:
Priority: 5
Risk: 3
Stage: Analysis/Assessment
Investment: $125,000.00
Payback: $16,750,000.00
Agile Manager
Edit
Document: Done

FIG. 13

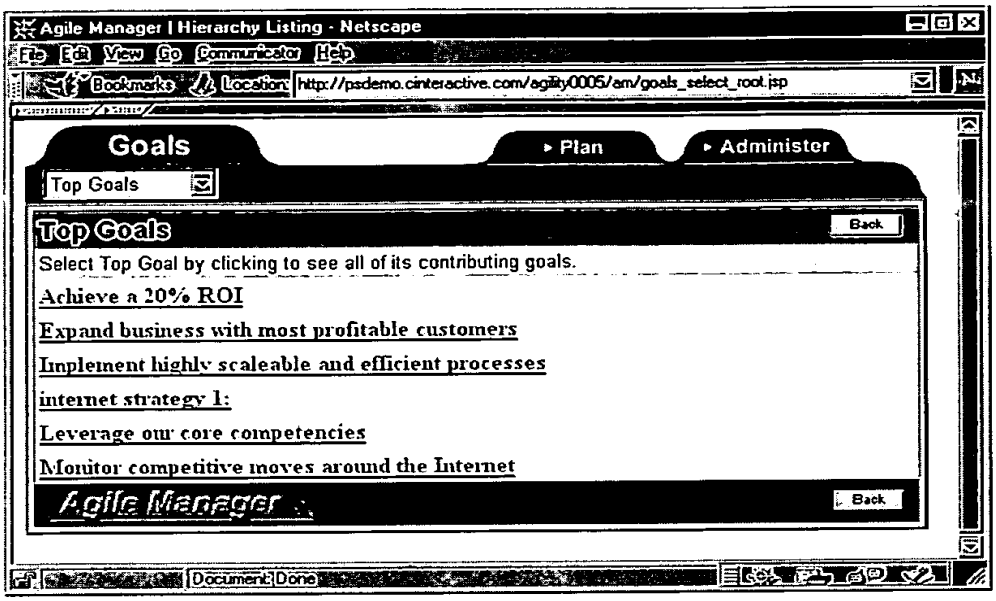

Agile Manager | Hierarchy Listing - Netscape
File Edit View Go Communicator Help
Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/goals_select_root.jsp
Goals
Plan
Administer
Top Goals
Top Goals
Back
Select Top Goal by clicking to see all of its contributing goals.
Achieve a 20% ROI
Expand business with most profitable customers
Implement highly scaleable and efficient processes
internet strategy 1:
Leverage our core competencies
Monitor competitive moves around the Internet
Agile Manager
Back
Document: Done

FIG. 14

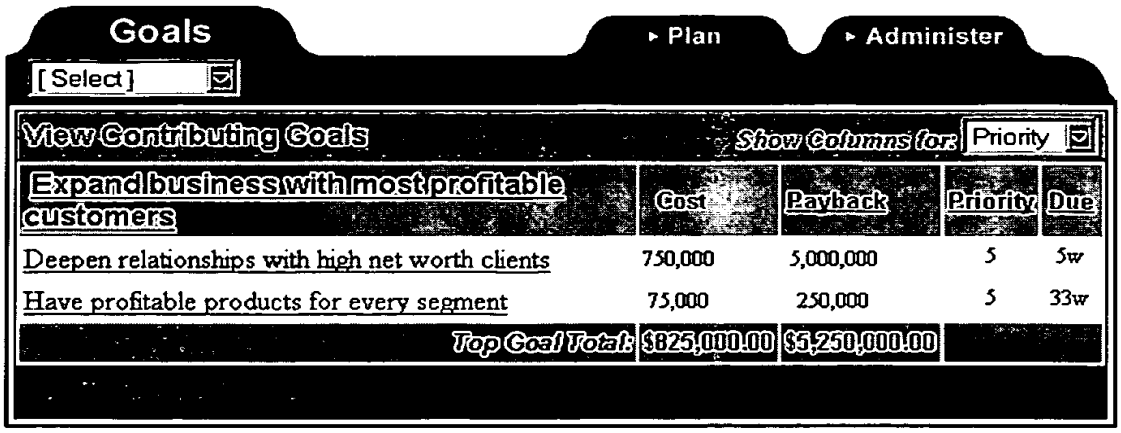


FIG. 15

09274260 : 05449 : 0447

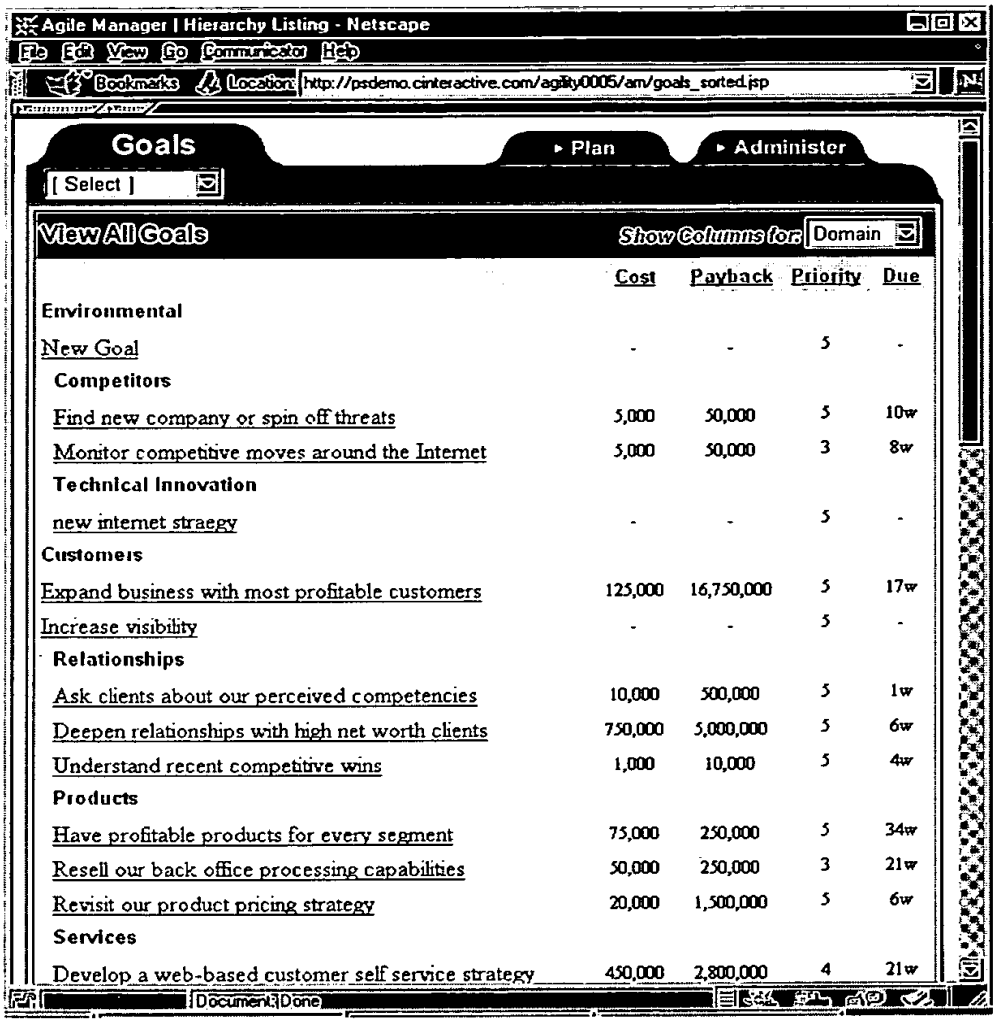
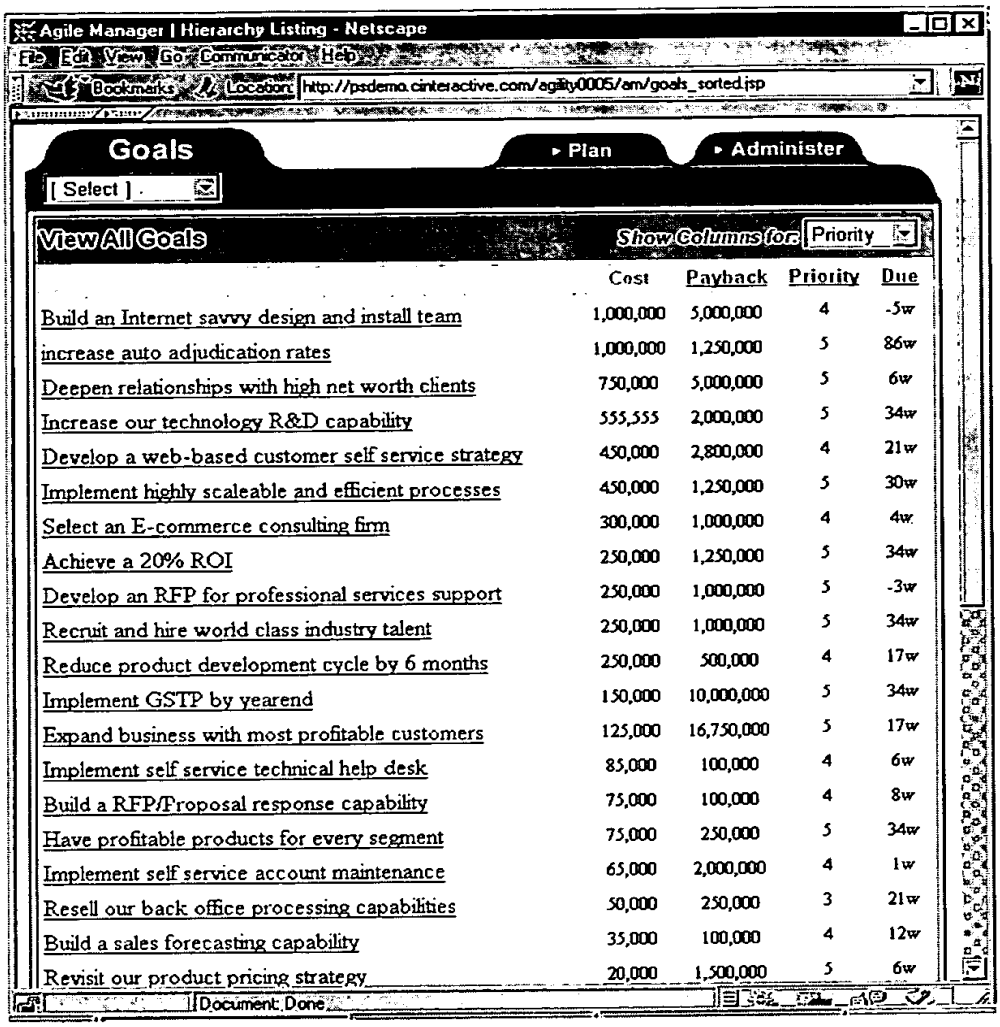
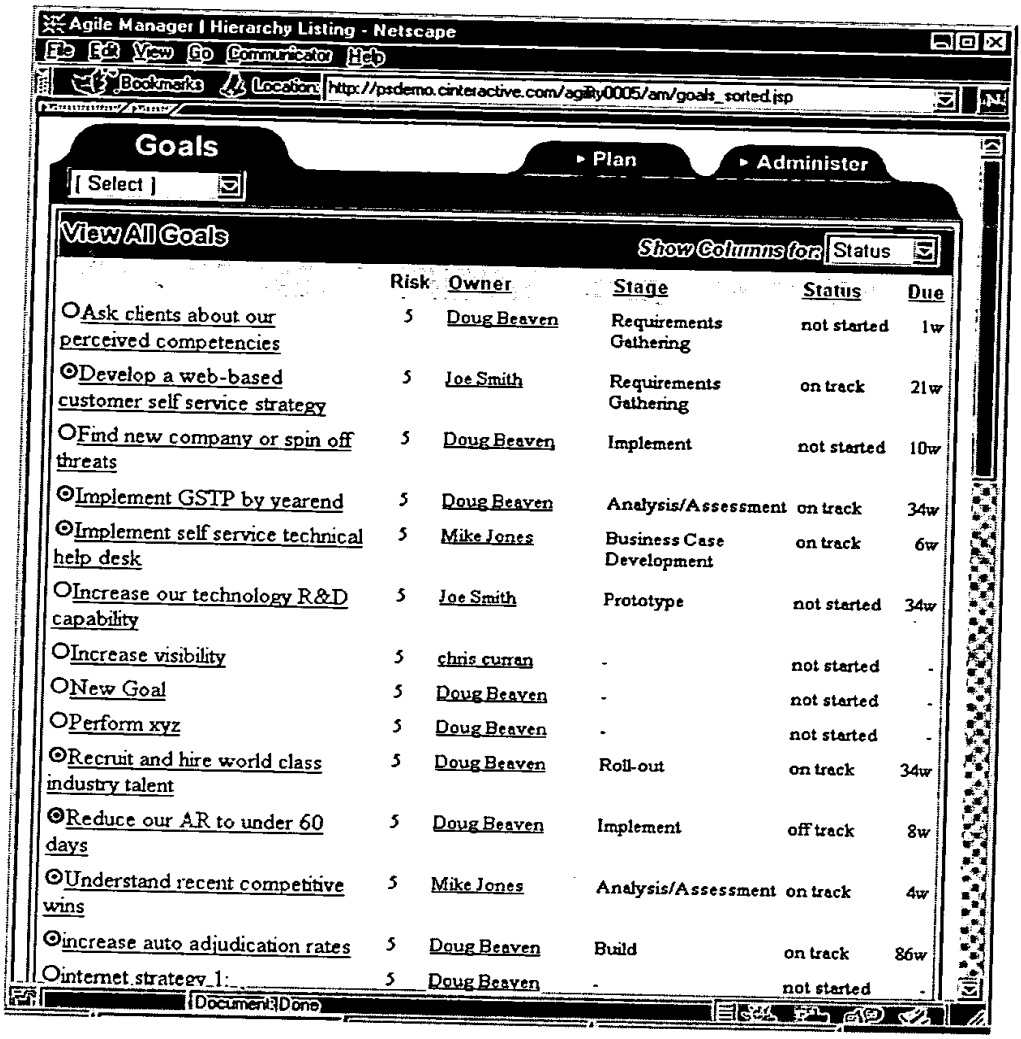

Agile Manager | Hierarchy Listing - Netscape
File Edit View Go Communicator Help
Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp
Goals
▸ Plan
▸ Administer
[Select]
View All Goals
Show Columns for: Domain
Cost Payback Priority Due
Environmental
New Goal - - 5 -
Competitors
Find new company or spin off threats 5,000 50,000 5 10w
Monitor competitive moves around the Internet 5,000 50,000 3 8w
Technical Innovation
new internet straegy - - 5 -
Customers
Expand business with most profitable customers 125,000 16,750,000 5 17w
Increase visibility - - 5 -
Relationships
Ask clients about our perceived competencies 10,000 500,000 5 1w
Deepen relationships with high net worth clients 750,000 5,000,000 5 6w
Understand recent competitive wins 1,000 10,000 5 4w
Products
Have profitable products for every segment 75,000 250,000 5 34w
Resell our back office processing capabilities 50,000 250,000 3 21w
Revisit our product pricing strategy 20,000 1,500,000 5 6w
Services
Develop a web-based customer self service strategy 450,000 2,800,000 4 21w
Document: Done

FIG. 16



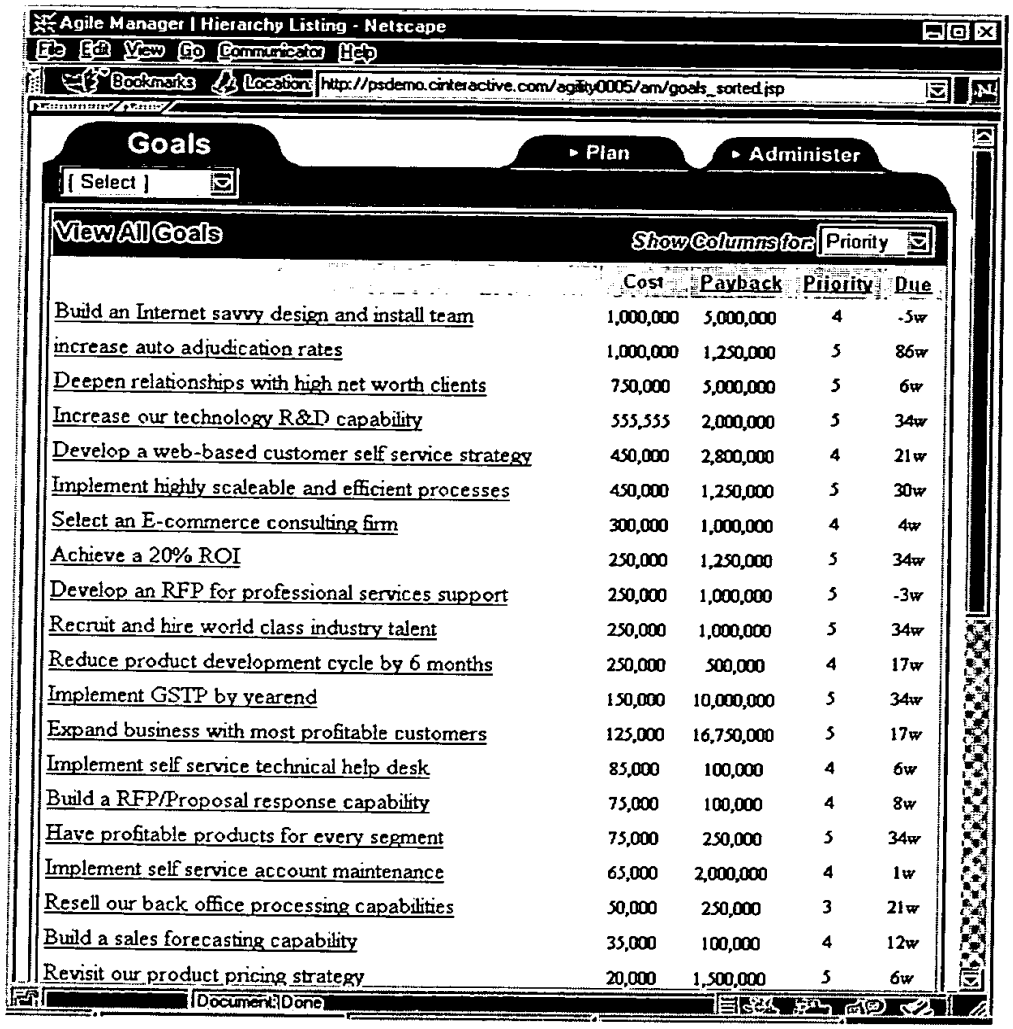
	Cost	Payback	Priority	Due
Build an Internet savvy design and install team	1,000,000	5,000,000	4	-5w
increase auto adjudication rates	1,000,000	1,250,000	5	86w
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Increase our technology R&D capability	555,555	2,000,000	5	34w
Develop a web-based customer self service strategy	450,000	2,800,000	4	21w
Implement highly scaleable and efficient processes	450,000	1,250,000	5	30w
Select an E-commerce consulting firm	300,000	1,000,000	4	4w
Achieve a 20% ROI	250,000	1,250,000	5	34w
Develop an RFP for professional services support	250,000	1,000,000	5	-3w
Recruit and hire world class industry talent	250,000	1,000,000	5	34w
Reduce product development cycle by 6 months	250,000	500,000	4	17w
Implement GSTP by yearend	150,000	10,000,000	5	34w
Expand business with most profitable customers	125,000	16,750,000	5	17w
Implement self service technical help desk	85,000	100,000	4	6w
Build a RFP/Proposal response capability	75,000	100,000	4	8w
Have profitable products for every segment	75,000	250,000	5	34w
Implement self service account maintenance	65,000	2,000,000	4	1w
Resell our back office processing capabilities	50,000	250,000	3	21w
Build a sales forecasting capability	35,000	100,000	4	12w
Revisit our product pricing strategy	20,000	1,500,000	5	6w

FIG. 17



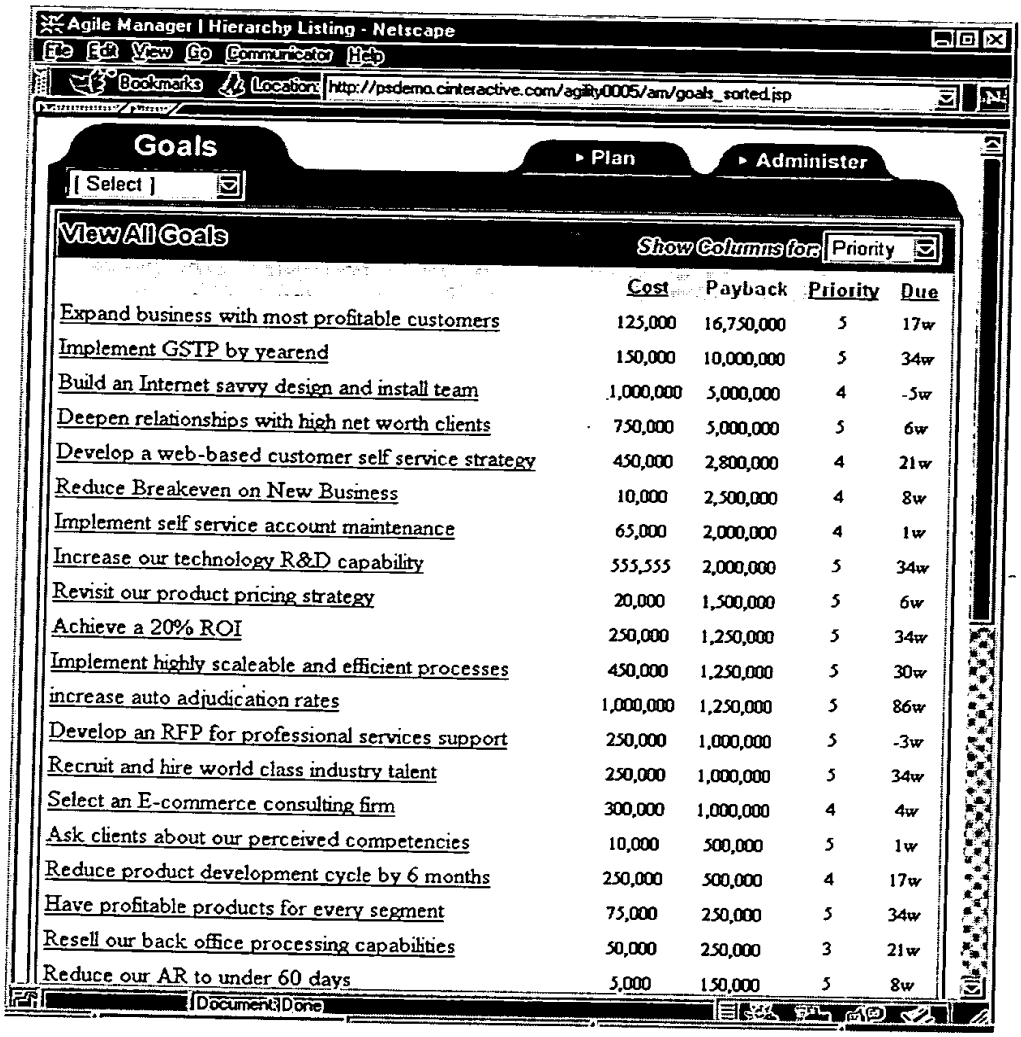
	Risk	Owner	Stage	Status	Due
Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1w
Develop a web-based customer self service strategy	5	Joe Smith	Requirements Gathering	on track	21w
Find new company or spin off threats	5	Doug Beaven	Implement	not started	10w
Implement GSTP by yearend	5	Doug Beaven	Analysis/Assessment	on track	34w
Implement self service technical help desk	5	Mike Jones	Business Case Development	on track	6w
Increase our technology R&D capability	5	Joe Smith	Prototype	not started	34w
Increase visibility	5	chris curran	-	not started	-
New Goal	5	Doug Beaven	-	not started	-
Perform xyz	5	Doug Beaven	-	not started	-
Recruit and hire world class industry talent	5	Doug Beaven	Roll-out	on track	34w
Reduce our AR to under 60 days	5	Doug Beaven	Implement	off track	8w
Understand recent competitive wins	5	Mike Jones	Analysis/Assessment	on track	4w
increase auto adjudication rates	5	Doug Beaven	Build	on track	86w
internet strategy_1:	5	Doug Beaven	-	not started	-

FIG. 18



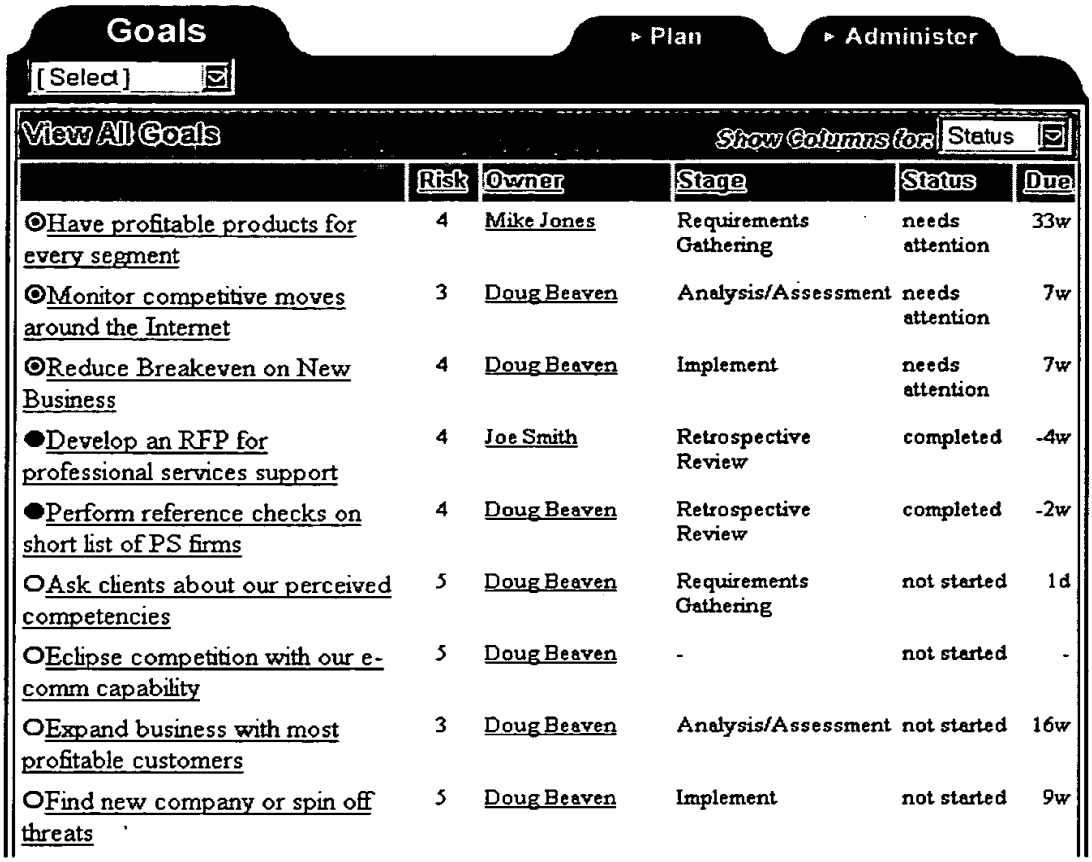
	Cost	Payback	Priority	Due
Build an Internet savvy design and install team	1,000,000	5,000,000	4	-5w
increase auto adjudication rates	1,000,000	1,250,000	5	86w
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Increase our technology R&D capability	555,555	2,000,000	5	34w
Develop a web-based customer self service strategy	450,000	2,800,000	4	21w
Implement highly scaleable and efficient processes	450,000	1,250,000	5	30w
Select an E-commerce consulting firm	300,000	1,000,000	4	4w
Achieve a 20% ROI	250,000	1,250,000	5	34w
Develop an RFP for professional services support	250,000	1,000,000	5	-3w
Recruit and hire world class industry talent	250,000	1,000,000	5	34w
Reduce product development cycle by 6 months	250,000	500,000	4	17w
Implement GSTP by yearend	150,000	10,000,000	5	34w
Expand business with most profitable customers	125,000	16,750,000	5	17w
Implement self service technical help desk	85,000	100,000	4	6w
Build a RFP/Proposal response capability	75,000	100,000	4	8w
Have profitable products for every segment	75,000	250,000	5	34w
Implement self service account maintenance	65,000	2,000,000	4	1w
Resell our back office processing capabilities	50,000	250,000	3	21w
Build a sales forecasting capability	35,000	100,000	4	12w
Revisit our product pricing strategy	20,000	1,500,000	5	6w

FIG. 19



	Cost	Payback	Priority	Due
Expand business with most profitable customers	125,000	16,750,000	5	17w
Implement GSTP by yearend	150,000	10,000,000	5	34w
Build an Internet savvy design and install team	1,000,000	5,000,000	4	-5w
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Develop a web-based customer self service strategy	450,000	2,800,000	4	21w
Reduce Breakeven on New Business	10,000	2,500,000	4	8w
Implement self service account maintenance	65,000	2,000,000	4	1w
Increase our technology R&D capability	555,555	2,000,000	5	34w
Revisit our product pricing strategy	20,000	1,500,000	5	6w
Achieve a 20% ROI	250,000	1,250,000	5	34w
Implement highly scaleable and efficient processes	450,000	1,250,000	5	30w
increase auto adjudication rates	1,000,000	1,250,000	5	86w
Develop an RFP for professional services support	250,000	1,000,000	5	-3w
Recruit and hire world class industry talent	250,000	1,000,000	5	34w
Select an E-commerce consulting firm	300,000	1,000,000	4	4w
Ask clients about our perceived competencies	10,000	500,000	5	1w
Reduce product development cycle by 6 months	250,000	500,000	4	17w
Have profitable products for every segment	75,000	250,000	5	34w
Resell our back office processing capabilities	50,000	250,000	3	21w
Reduce our AR to under 60 days	5,000	150,000	5	8w

FIG. 20



	Risk	Owner	Stage	Status	Due
⊙Have profitable products for every segment	4	Mike Jones	Requirements Gathering	needs attention	33w
⊙Monitor competitive moves around the Internet	3	Doug Beaven	Analysis/Assessment	needs attention	7w
⊙Reduce Breakeven on New Business	4	Doug Beaven	Implement	needs attention	7w
●Develop an RFP for professional services support	4	Joe Smith	Retrospective Review	completed	-4w
●Perform reference checks on short list of PS firms	4	Doug Beaven	Retrospective Review	completed	-2w
○Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1d
○Eclipse competition with our e-comm capability	5	Doug Beaven	-	not started	-
○Expand business with most profitable customers	3	Doug Beaven	Analysis/Assessment	not started	16w
○Find new company or spin off threats	5	Doug Beaven	Implement	not started	9w

FIG. 21

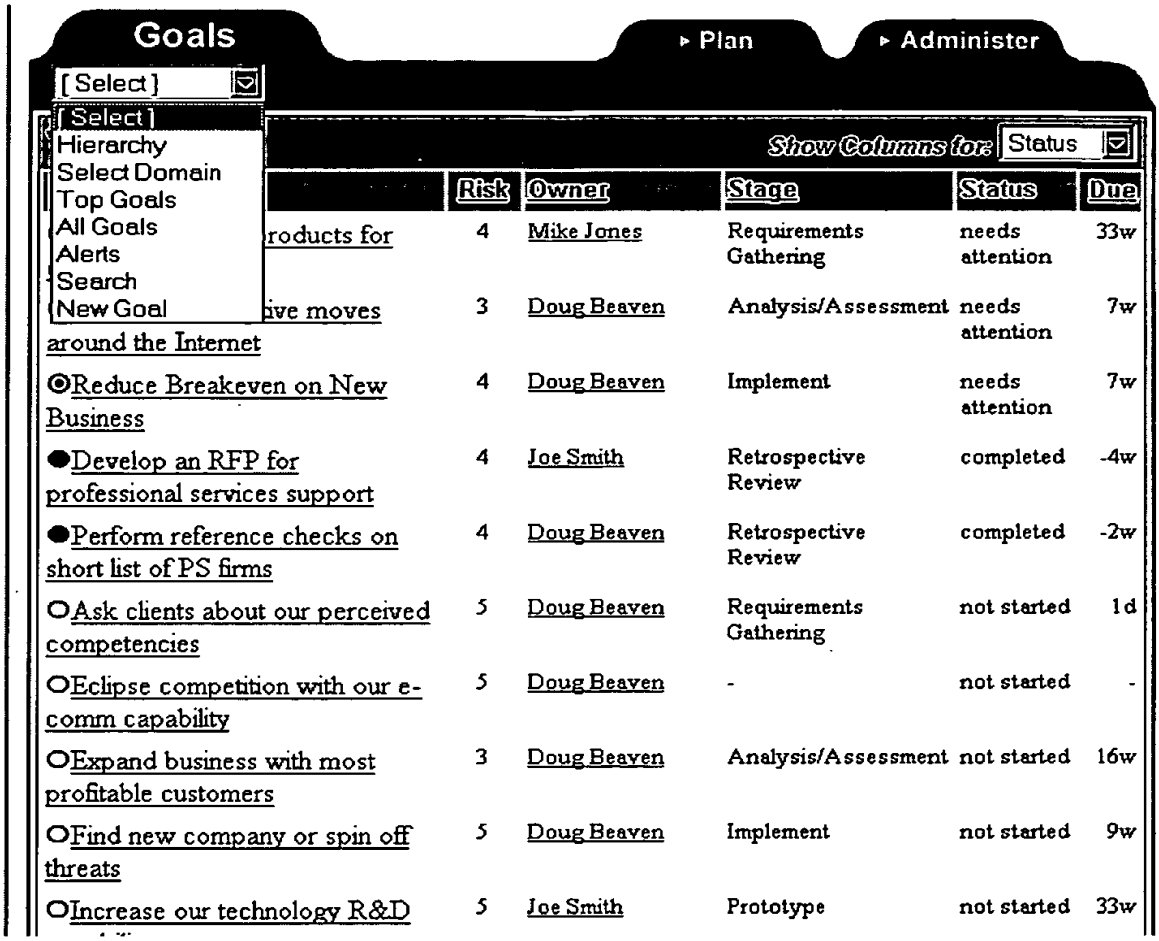

Goals
Plan
Administer
[Select]
[Select]
Hierarchy
Select Domain
Top Goals
All Goals
Alerts
Search
New Goal
Show Columns for: Status
Risk
Owner
Stage
Status
Due
roducts for
4
Mike Jones
Requirements Gathering
needs attention
33w
ive moves around the Internet
3
Doug Beaven
Analysis/Assessment
needs attention
7w
Reduce Breakeven on New Business
4
Doug Beaven
Implement
needs attention
7w
Develop an RFP for professional services support
4
Joe Smith
Retrospective Review
completed
-4w
Perform reference checks on short list of PS firms
4
Doug Beaven
Retrospective Review
completed
-2w
Ask clients about our perceived competencies
5
Doug Beaven
Requirements Gathering
not started
1d
Eclipse competition with our e-comm capability
5
Doug Beaven
-
not started
-
Expand business with most profitable customers
3
Doug Beaven
Analysis/Assessment
not started
16w
Find new company or spin off threats
5
Doug Beaven
Implement
not started
9w
Increase our technology R&D
5
Joe Smith
Prototype
not started
33w

FIG. 22

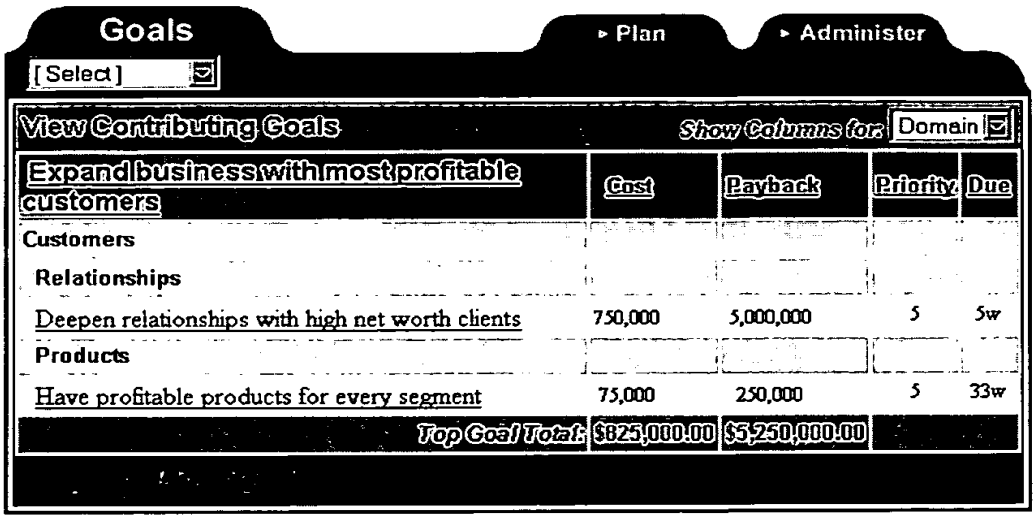


FIG. 23

6074250 "Oct 27 2000

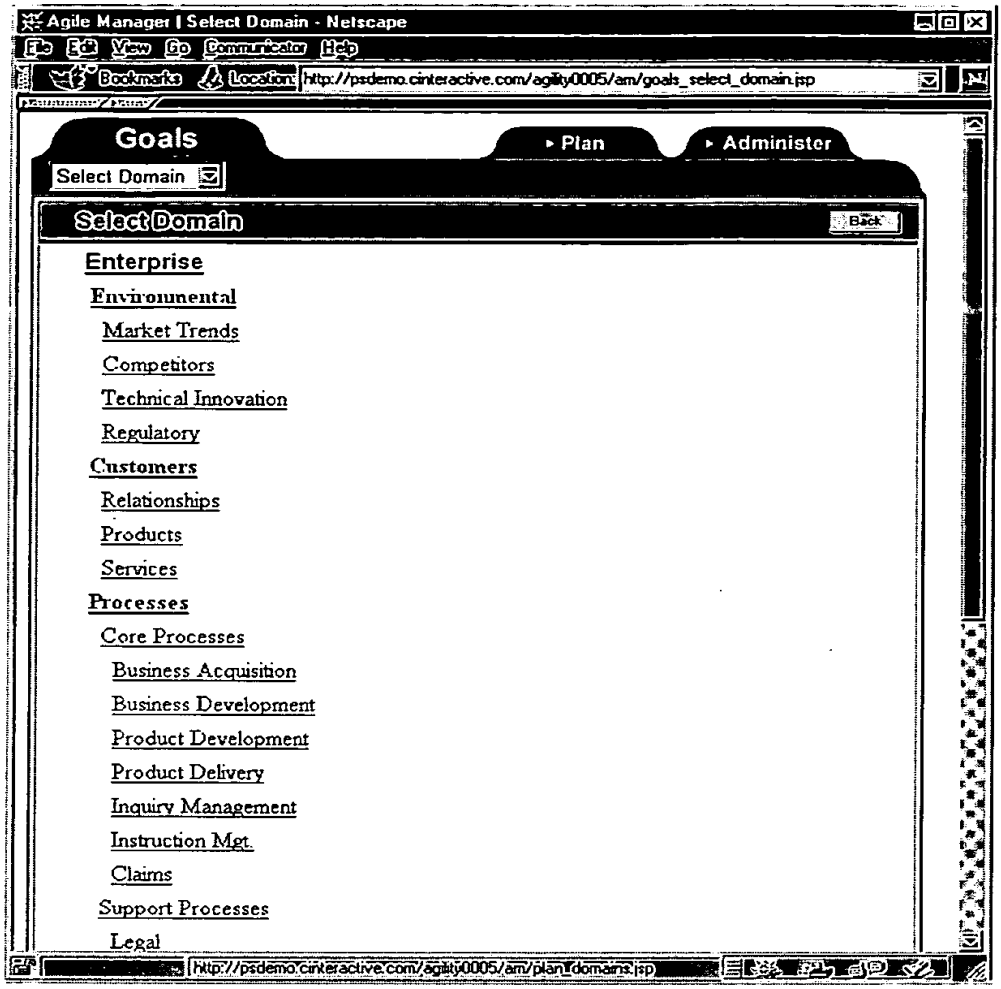

Agile Manager | Select Domain - Netscape
File Edit View Go Communicator Help
Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/goals_select_domain.jsp
Goals
Plan
Administer
Select Domain
Select Domain
Back
Enterprise
Environmental
Market Trends
Competitors
Technical Innovation
Regulatory
Customers
Relationships
Products
Services
Processes
Core Processes
Business Acquisition
Business Development
Product Development
Product Delivery
Inquiry Management
Instruction Mgt.
Claims
Support Processes
Legal
http://psdemo.cinteractive.com/agility0005/am/plan?domains.jsp

FIG. 24

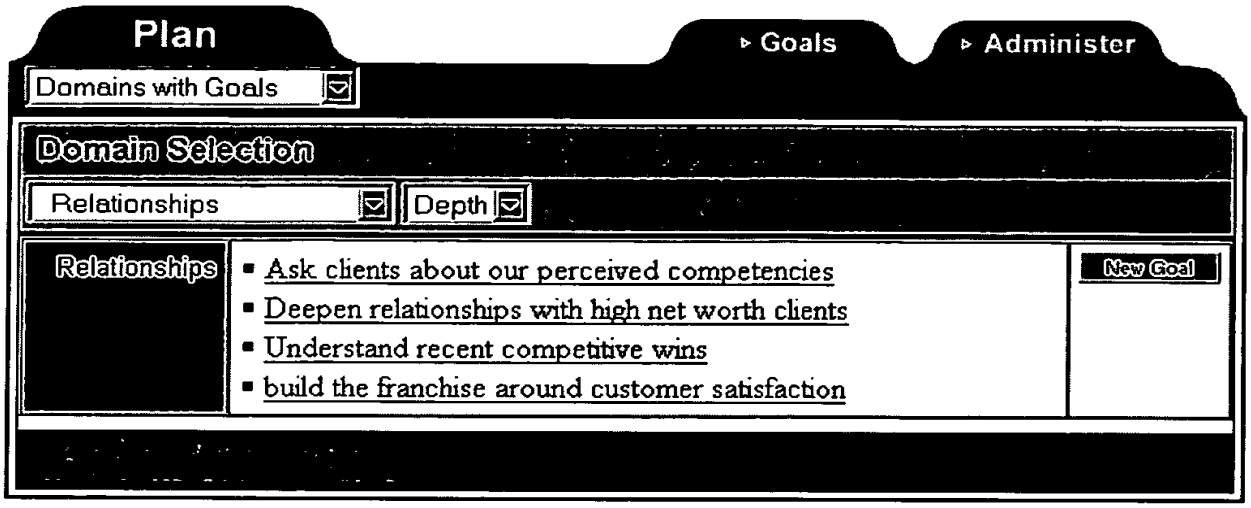

Plan
Goals
Administer
Domains with Goals
Domain Selection
Relationships
Depth
Relationships
Ask clients about our perceived competencies
Deepen relationships with high net worth clients
Understand recent competitive wins
build the franchise around customer satisfaction
New Goal

FIG. 25

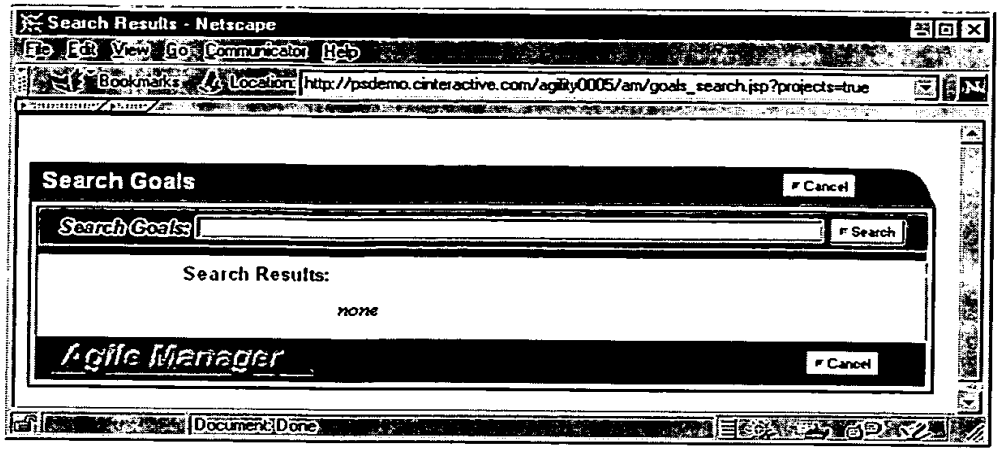

Search Results - Netscape
File Edit View Go Communicator Help
Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/goals_search.jsp?projects=true
Search Goals
Cancel
Search Goals:
Search
Search Results:
none
Agile Manager
Cancel
Document: Done

FIG. 26

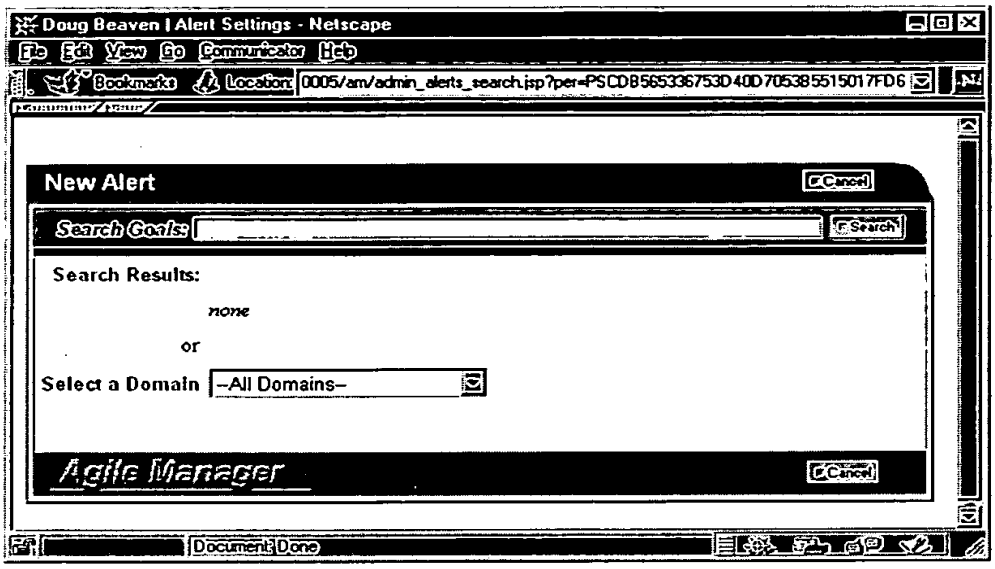

Doug Beaven | Alert Settings - Netscape
File Edit View Go Communicator Help
Bookmarks Location: 0005/am/admin_alerts_search.jsp?per=PSCDB565336753D40D705385515017FD6
New Alert
Cancel
Search Goals:
Search
Search Results:
none
or
Select a Domain --All Domains--
Agile Manager
Cancel
Document: Done

FIG. 27

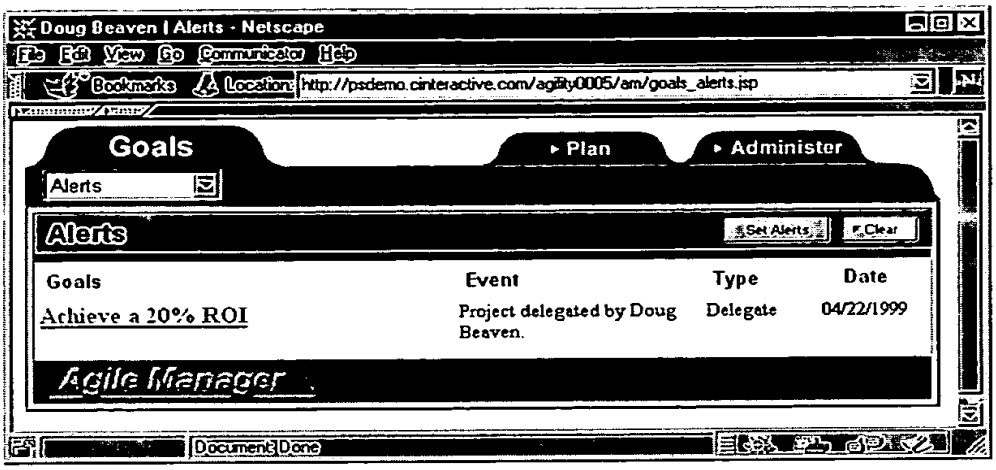

Doug Beaven | Alerts - Netscape
File Edit View Go Communicator Help
Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/goals_alerts.jsp
Goals
Plan
Administer
Alerts
Alerts
Set Alerts
Clear
Goals
Event
Type
Date
Achieve a 20% ROI
Project delegated by Doug Beaven.
Delegate
04/22/1999
Agile Manager
Document: Done

FIG. 28

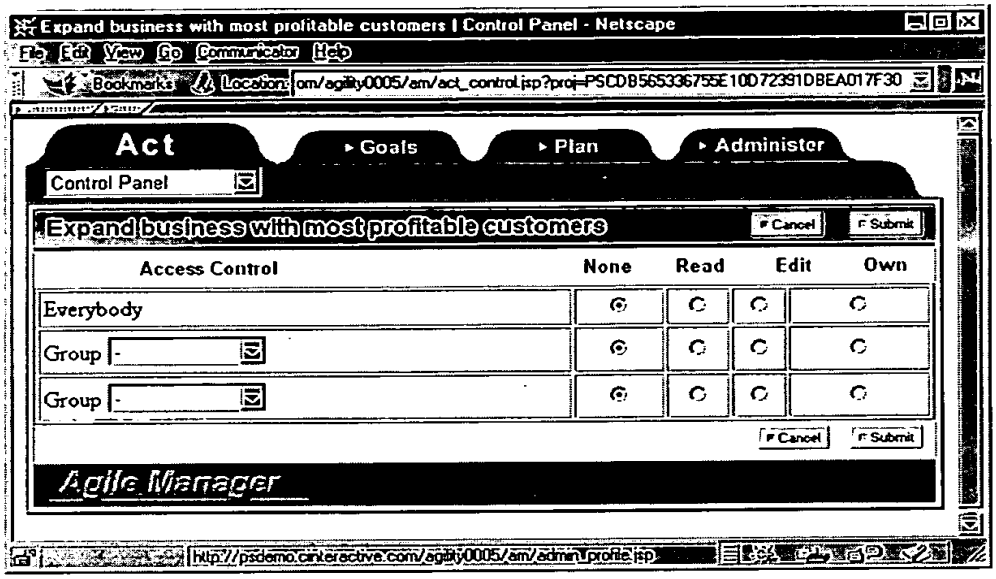

Expand business with most profitable customers | Control Panel - Netscape
File Edit View Go Communicator Help
Bookmarks Location: om/agility0005/am/act_control.jsp?proj=PSCDB565336755E10D72391DBEA017F30
Act
Goals
Plan
Administer
Control Panel
Expand business with most profitable customers
Cancel
Submit
Access Control
None
Read
Edit
Own
Everybody
Group
Group
Cancel
Submit
Agile Manager
http://psdemo.cinteractive.com/agility0005/am/admin/profile.jsp

FIG. 29

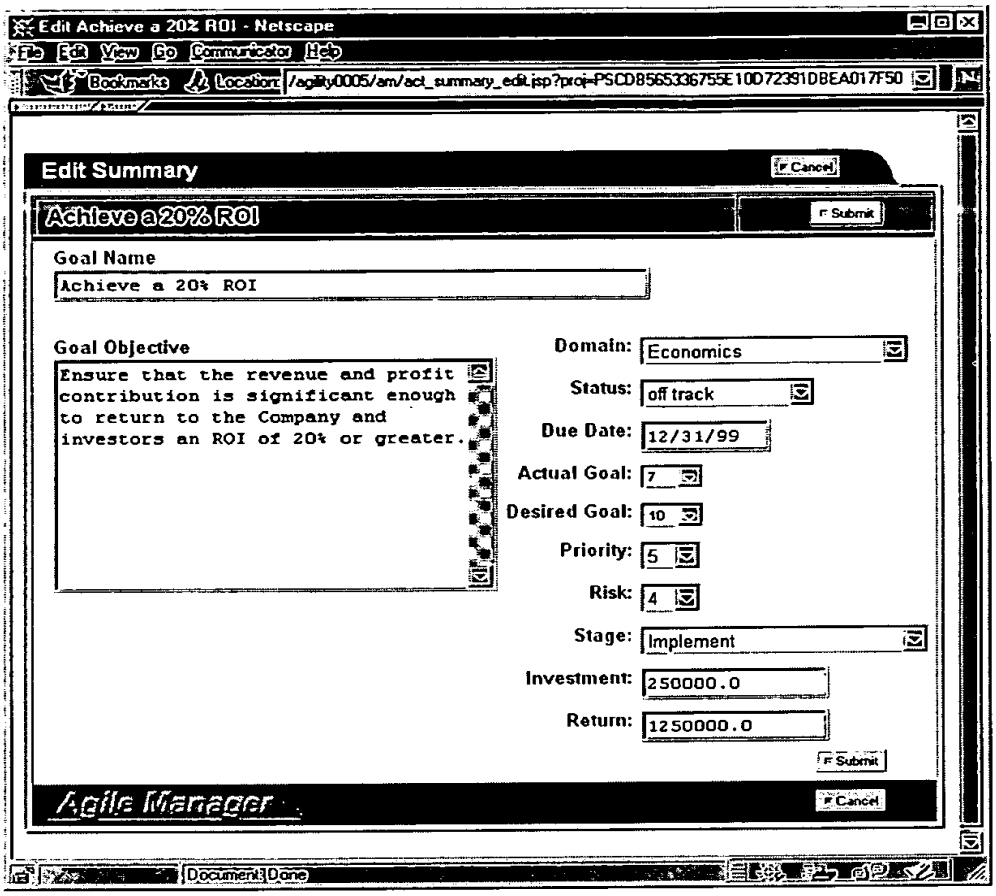

Edit Achieve a 20% ROI - Netscape
File Edit View Go Communicator Help
Bookmarks Location: /agility0005/am/act_summary_edit.jsp?proj=PSCD8565336755E10D72391DBEA017F50
Edit Summary
Cancel
Achieve a 20% ROI
Submit
Goal Name
Achieve a 20% ROI
Goal Objective
Ensure that the revenue and profit contribution is significant enough to return to the Company and investors an ROI of 20% or greater.
Domain: Economics
Status: off track
Due Date: 12/31/99
Actual Goal: 7
Desired Goal: 10
Priority: 5
Risk: 4
Stage: Implement
Investment: 250000.0
Return: 1250000.0
Submit
Agile Manager
Cancel
Document Done

FIG. 30

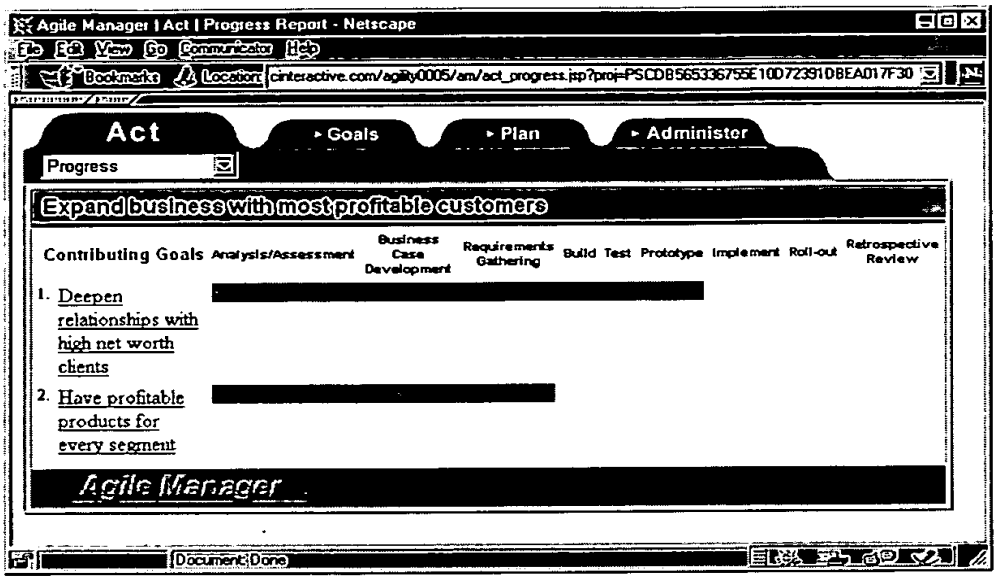

Agile Manager | Act | Progress Report - Netscape
File Edit View Go Communicator Help
Bookmarks Location cinteractive.com/agility0005/am/act_progress.jsp?proj=PSCDB565336755E10D723910BEA017F30
Act
Goals
Plan
Administer
Progress
Expand business with most profitable customers
Contributing Goals
Analysis/Assessment
Business Case Development
Requirements Gathering
Build
Test
Prototype
Implement
Roll-out
Retrospective Review
1. Deepen relationships with high net worth clients
2. Have profitable products for every segment
Agile Manager
Document: Done

FIG. 31

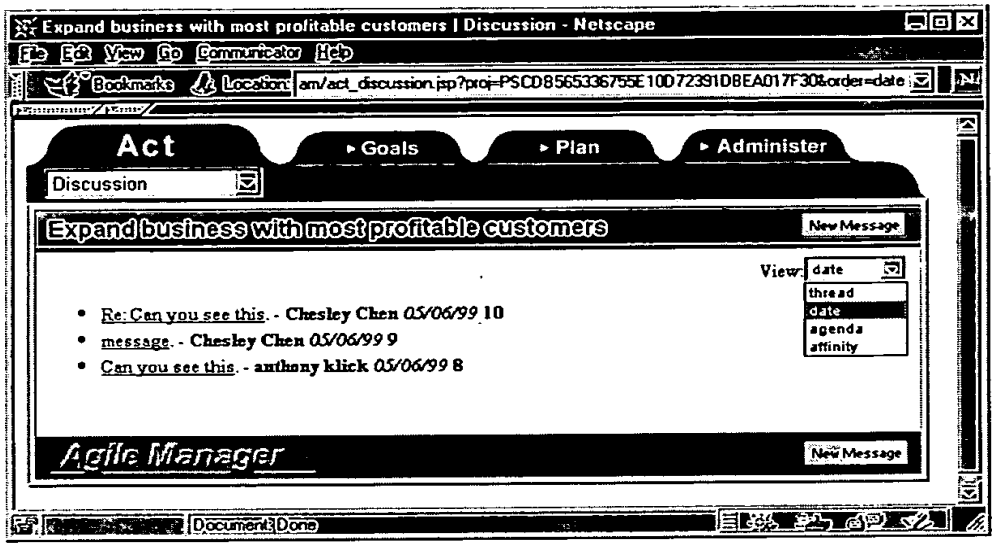

Expand business with most profitable customers | Discussion - Netscape
File Edit View Go Communicator Help
Bookmarks Location: am/act_discussion.jsp?proj=PSCD8565336755E10D72391DBEA017F30&order=date
Act
▸ Goals
▸ Plan
▸ Administer
Discussion
Expand business with most profitable customers
New Message
View: date
thread
date
agenda
affinity
Re: Can you see this. - Chesley Chen 05/06/99 10
message. - Chesley Chen 05/06/99 9
Can you see this. - anthony klick 05/06/99 8
Agile Manager
New Message
Document: Done

FIG. 32

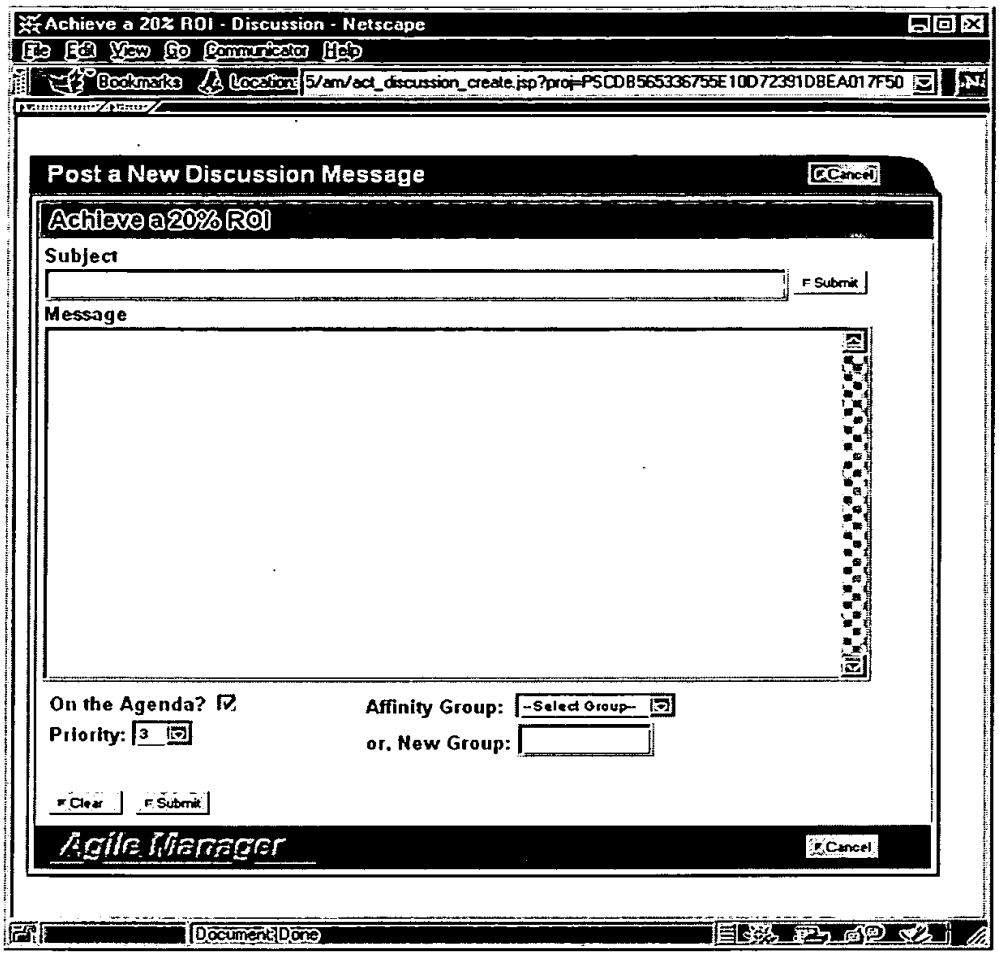

Achieve a 20% ROI - Discussion - Netscape
File Edit View Go Communicator Help
Bookmarks Location: 5/am/act_discussion_create.jsp?proj=PSCDB565336755E10D72391DBEA017F50
Post a New Discussion Message
Cancel
Achieve a 20% ROI
Subject
Submit
Message
On the Agenda?
Priority: 3
Affinity Group: --Select Group--
or, New Group:
Clear
Submit
Agile Manager
Cancel
Document: Done

FIG. 33

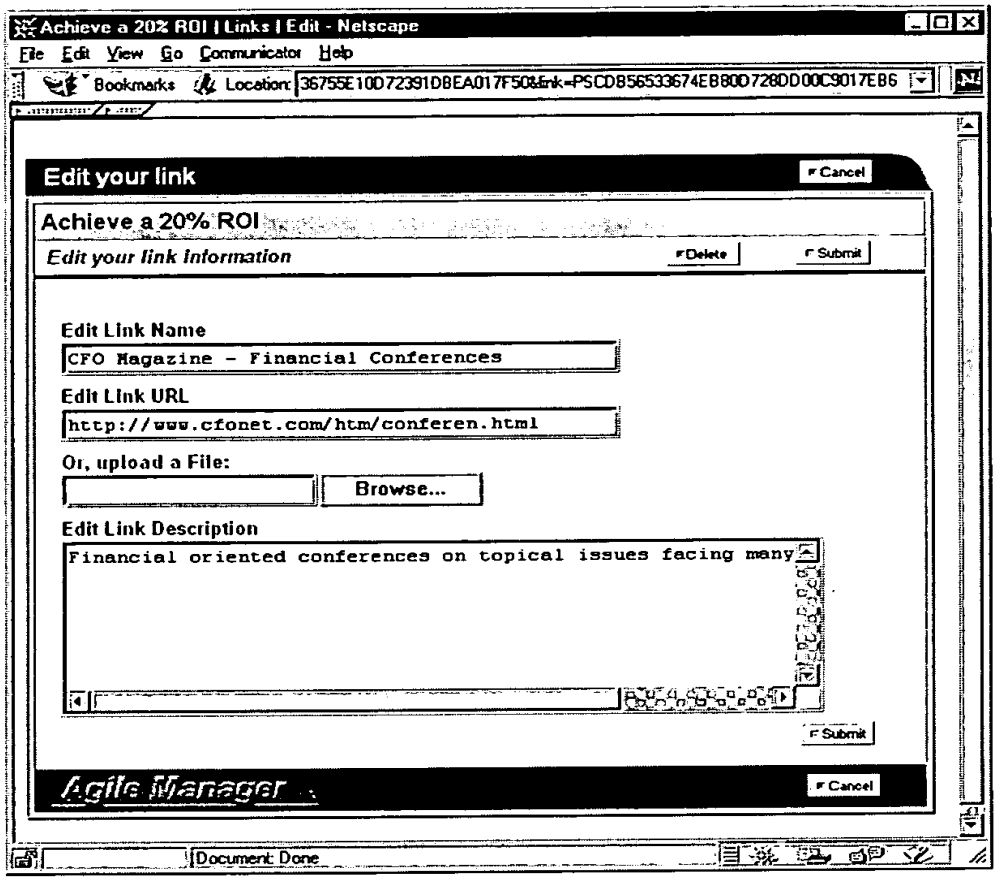

Achieve a 20% ROI | Links | Edit - Netscape
File Edit View Go Communicator Help
Bookmarks Location: 36755E10D72391DBEA017F50&link=PSCD856533674EB80D728DD00C9017EB6
Edit your link
Cancel
Achieve a 20% ROI
Edit your link information
Delete
Submit
Edit Link Name
CFO Magazine - Financial Conferences
Edit Link URL
http://www.cfonet.com/htm/conferen.html
Or, upload a File:
Browse...
Edit Link Description
Financial oriented conferences on topical issues facing many
Submit
Agile Manager
Cancel
Document: Done

FIG. 34

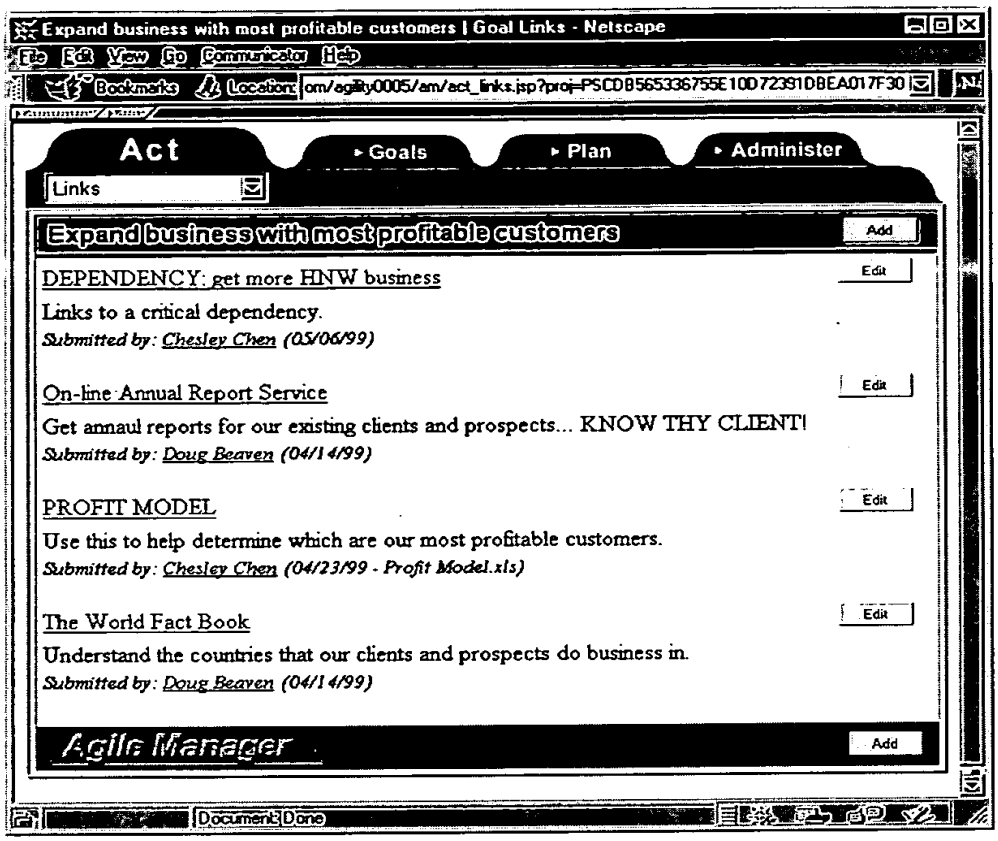

Expand business with most profitable customers | Goal Links - Netscape
File Edit View Go Communicator Help
Bookmarks Location: om/agility0005/am/act_links.jsp?proj=PSCDB565336755E10D72391DBEA017F30
Act
Goals
Plan
Administer
Links
Expand business with most profitable customers
Add
DEPENDENCY: get more HNW business
Edit
Links to a critical dependency.
Submitted by: Chesley Chen (05/06/99)
On-line Annual Report Service
Edit
Get annaul reports for our existing clients and prospects... KNOW THY CLIENT!
Submitted by: Doug Beaven (04/14/99)
PROFIT MODEL
Edit
Use this to help determine which are our most profitable customers.
Submitted by: Chesley Chen (04/23/99 - Profit Model.xls)
The World Fact Book
Edit
Understand the countries that our clients and prospects do business in.
Submitted by: Doug Beaven (04/14/99)
Agile Manager
Add
Document: Done

FIG. 35

Agility
MANAGEMENT PARTNERS

EMPLOYEES ARE TREATED LIKE OWNERS

EMPLOYEES ARE TREATED LIKE AND COMPENSATED IN A MANNER REFLECTIVE OF OWNERSHIP RATHER THAN SERVITUDE.

"Employees [must] trust the company and believe changes are in their best interests." - Donald K.Clifford and Richard E.Cavanagh, *The Winning Performance*

High Performance Traits.
Relish change
Fight inertia
Clear strategy
Customer driven
Act like owners
Treated like owners
Reward risk taking
Fact based decisions
Value based decisions
Effective systems
Open to new ideas
Adapt
Process changes
Constant improvement
Fluid boundaries
Teamwork
Anti-bureaucracy
Know business drivers
Make alliances
Focused clearly
Industry trends & challenges
Basic Information
Feedback

	Strongly Disagree	Disagree	Slightly Disagree	Neutral	Slightly Agree	Agree	Strongly Agree	No Response
1. Managers in this company respect the rights of employees and treat them with dignity and respect.	o	o	o	o	o	o	o	o
2. Job objectives are aligned with the overall corporate vision.	o	o	o	o	o	o	o	o
3. Performance information is shared with employees so they stay focused on results.	o	o	o	o	o	o	o	o
4. Compensation and reward structures are aligned with company and/or unit performance.	o	o	o	o	o	o	o	o

FIG. 36

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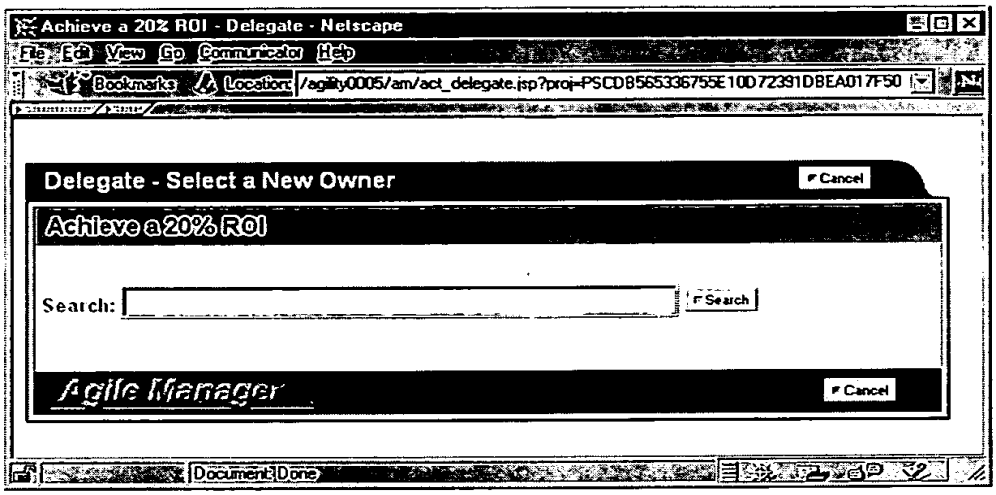
Achieve a 20% ROI - Delegate - Netscape
File Edit View Go Communicator Help
Bookmarks Location: /agility0005/am/act_delegate.jsp?proj=PSCD8565336755E10D72391DBEA017F50
Delegate - Select a New Owner
Cancel
Achieve a 20% ROI
Search:
Search
Agile Manager
Cancel
Document: Done

FIG. 36A

Confidential

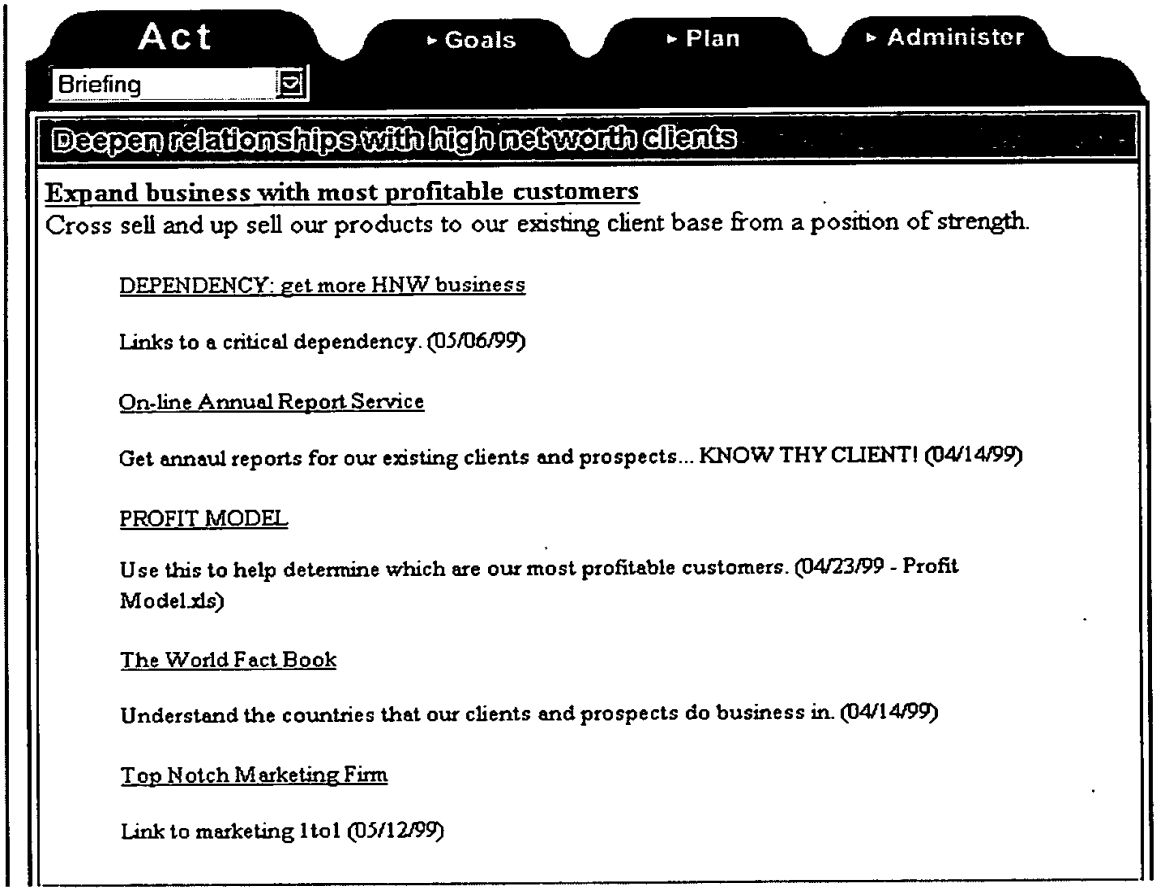

FIG. 37

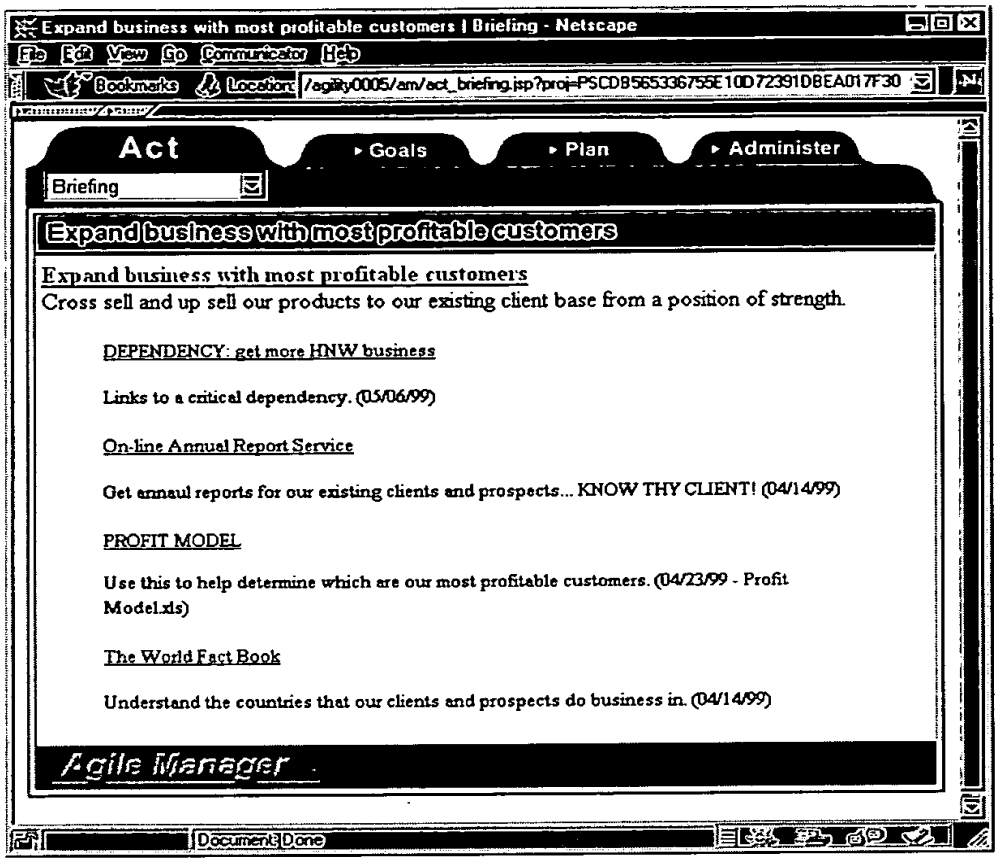
Expand business with most profitable customers | Briefing - Netscape
File Edit View Go Communicator Help
Bookmarks Location: /agility0005/am/act_briefing.jsp?proj=PSCDB565336755E10D72391DBEA017F30
Act
▸ Goals
▸ Plan
▸ Administer
Briefing
Expand business with most profitable customers
Expand business with most profitable customers
Cross sell and up sell our products to our existing client base from a position of strength.
DEPENDENCY: get more HNW business
Links to a critical dependency. (05/06/99)
On-line Annual Report Service
Get annaul reports for our existing clients and prospects... KNOW THY CLIENT! (04/14/99)
PROFIT MODEL
Use this to help determine which are our most profitable customers. (04/23/99 - Profit Model.xls)
The World Fact Book
Understand the countries that our clients and prospects do business in. (04/14/99)
Agile Manager
Document: Done

FIG. 38

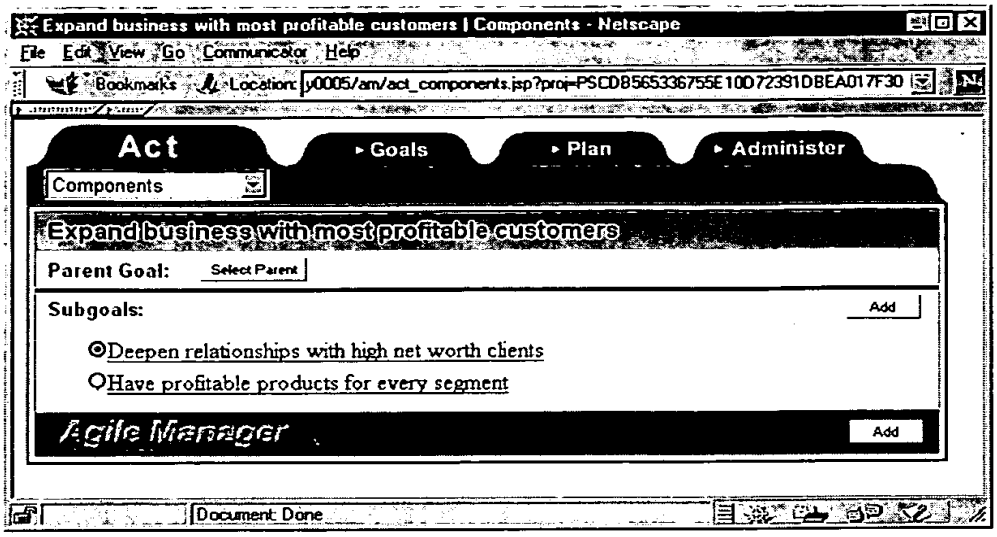
Expand business with most profitable customers | Components - Netscape
File Edit View Go Communicator Help
Bookmarks Location: y0005/am/act_components.jsp?proj=PSCDB565336755E10D72391DBEA017F30
Act
▸ Goals
▸ Plan
▸ Administer
Components
Expand business with most profitable customers
Parent Goal:
Select Parent
Subgoals:
Add
Deepen relationships with high net worth clients
Have profitable products for every segment
Agile Manager
Add
Document: Done

FIG. 39

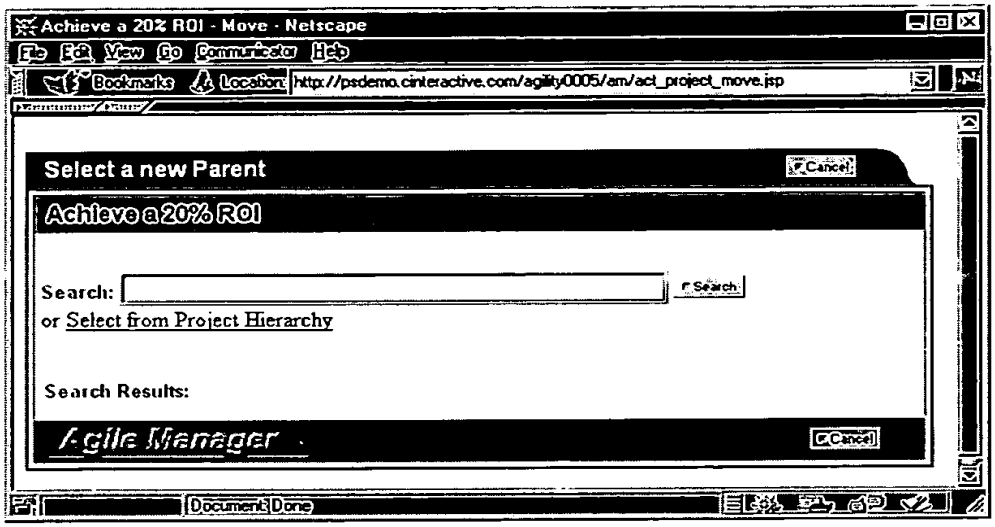
Achieve a 20% ROI - Move - Netscape
File Edit View Go Communicator Help
Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/act_project_move.jsp
Select a new Parent
Cancel
Achieve a 20% ROI
Search:
Search
or Select from Project Hierarchy
Search Results:
Agile Manager
Cancel
Document: Done

FIG. 40

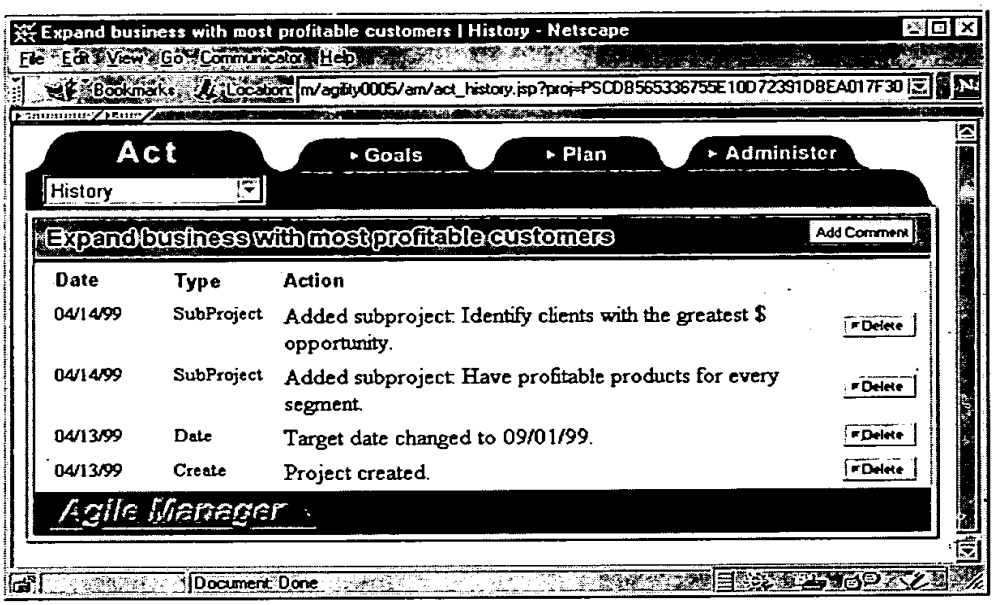
Expand business with most profitable customers | History - Netscape
File Edit View Go Communicator Help
Bookmarks Location: m/agility0005/am/act_history.jsp?proj=PSCDB565336755E10D72391D8EA017F30
Act
Goals
Plan
Administer
History
Expand business with most profitable customers
Add Comment
Date
Type
Action
04/14/99
SubProject
Added subproject: Identify clients with the greatest $ opportunity.
Delete
04/14/99
SubProject
Added subproject: Have profitable products for every segment.
Delete
04/13/99
Date
Target date changed to 09/01/99.
Delete
04/13/99
Create
Project created.
Delete
Agile Manager
Document: Done

FIG. 41